Software User's Manual

E-Lockbox

Team 08

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12/1/2014

Version History

Date	Author	Version	Changes made	Rationale
11/21/14	Hanadi Mardah	1.0	• Initial User manual draft	• The initial user Manual draft its created as a guideline for the CCD clients presentation
12/1/14	Hanadi Mardah	1.1	• User Manual second version	• Create new functions (mass email, security questions) and modify login page

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1. Introduction
1.1 System Overview

The purpose of our system *E-Lockbox* is to help employees working at Living Advantage manage their documents securely and conveniently. *E-Lockbox* will be secure, yet accessible to gather and hold records on youth in the foster care system. *E-Lockbox* will help recruit such youth and mentors, both directly and indirectly. This allows them to be identifiable and able to receive services and resources from the community on a consistent basis. They can better advocate for themselves as we assist in setting up a database for their personal history of information. They will be provided with access to continuous on line education and offered independent living skills and employment resources.

The website will serve as a virtual online community for youth to voice their opinions, achievements, be engaged at our events and activities that help promote lifelong connections to supportive adults and peers for a higher rate of self sufficiency

1.2 System Requirements
1.2.1 Hardware Requirements

There is no specific hardware needed for running the system except a computer with Internet access.

1.2.2 Software Requirements

Although E-Lockbox is going to be deployed in Go Daddy and use Amazon S3 to store vital documents and no specific requirements are needed, E-Lockbox has been tested on the following and desirable software configurations:

Software Required	Name and Version
Operative system	Windows 8, Mac OS 10.8
Web Browser	Chrome, Safari, Firefox

1.2.3 Other Requirements

2. Installation Procedures

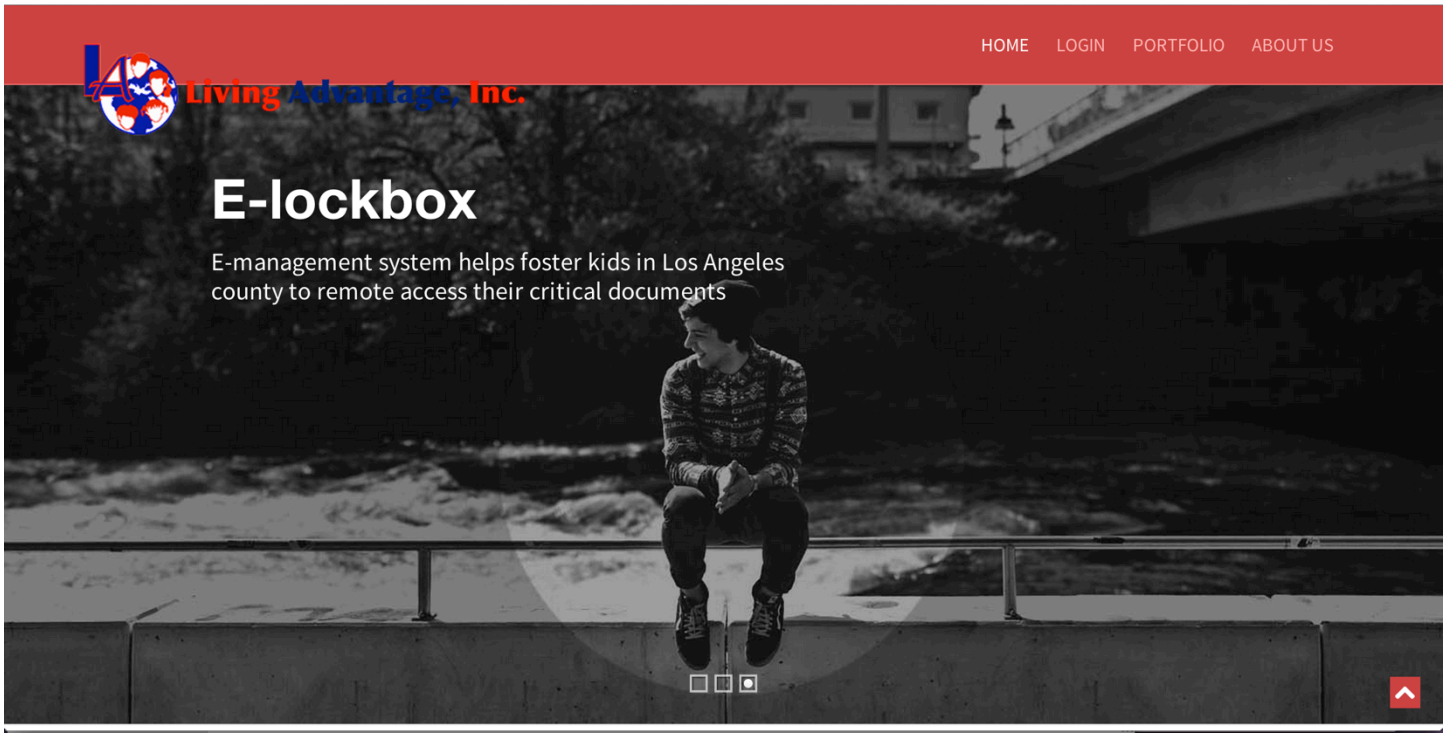
No installation is needed.

2.1 Initialization procedures
2.2 Re-installation
2.3 De-installation

3. Operational Procedures

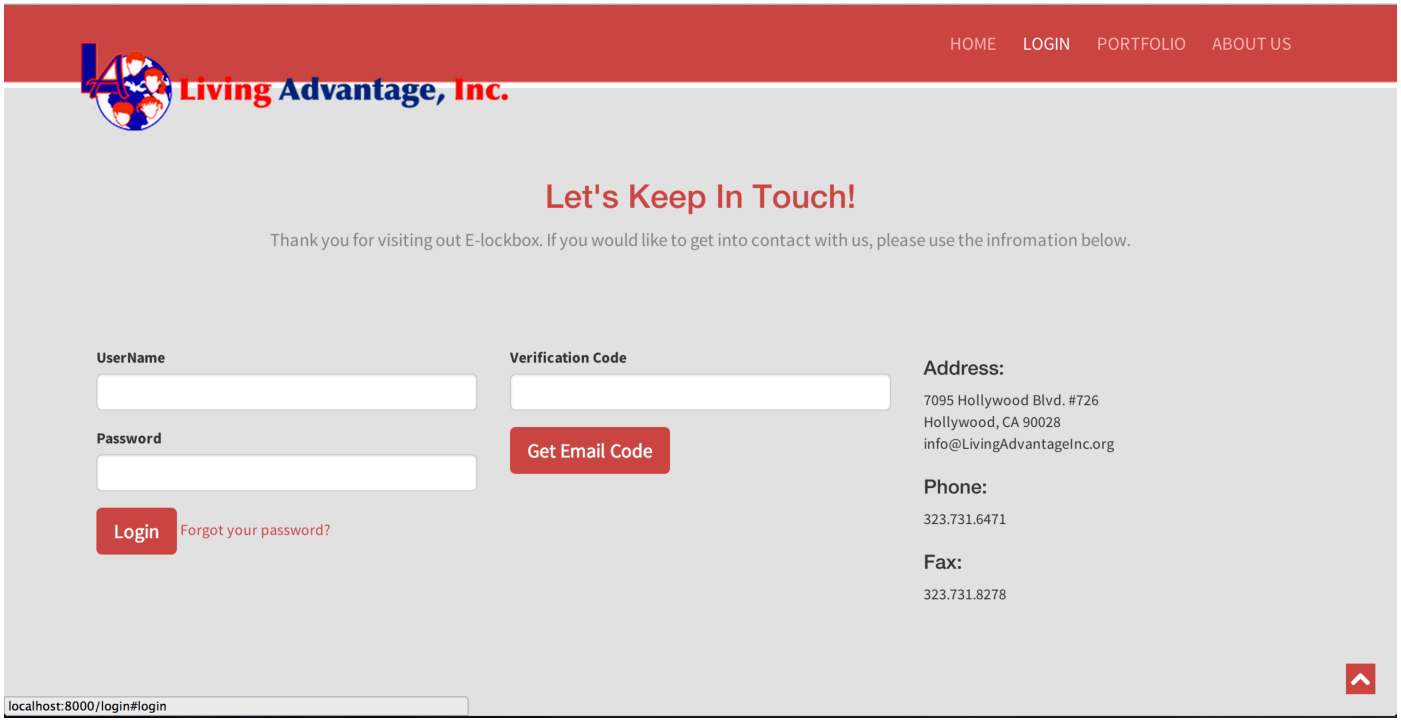
3.1 Login

3.1.1 Home page



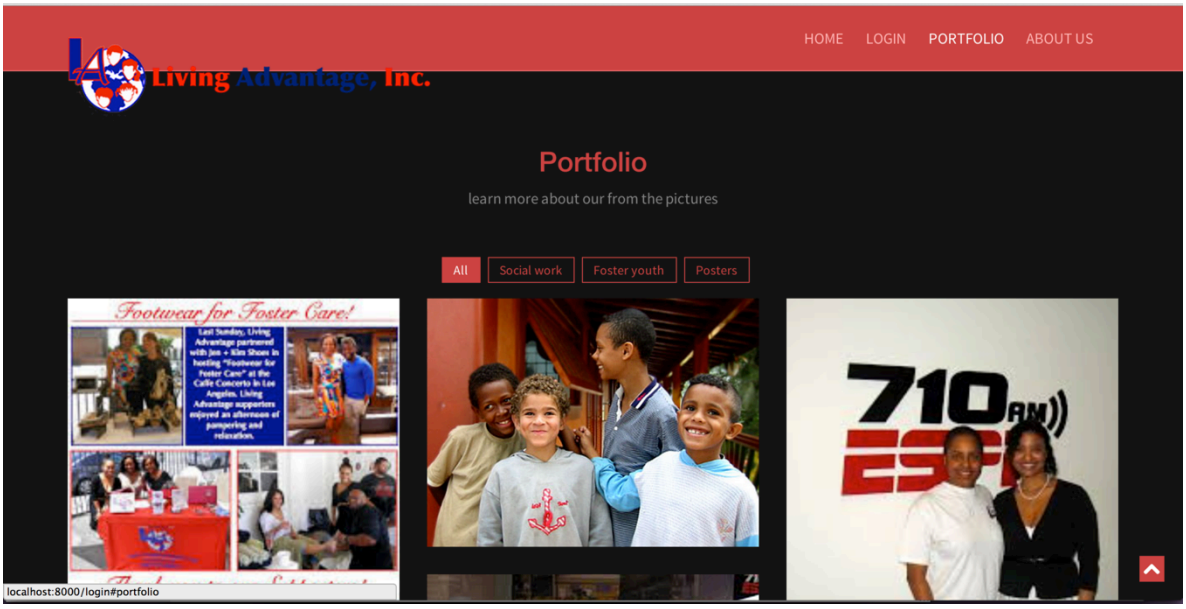
This is the home page of the E-lockbox system, which gives users more friendlily introduction of the system. Also, it is more modern design of interface for the users.

3.1.2 Login

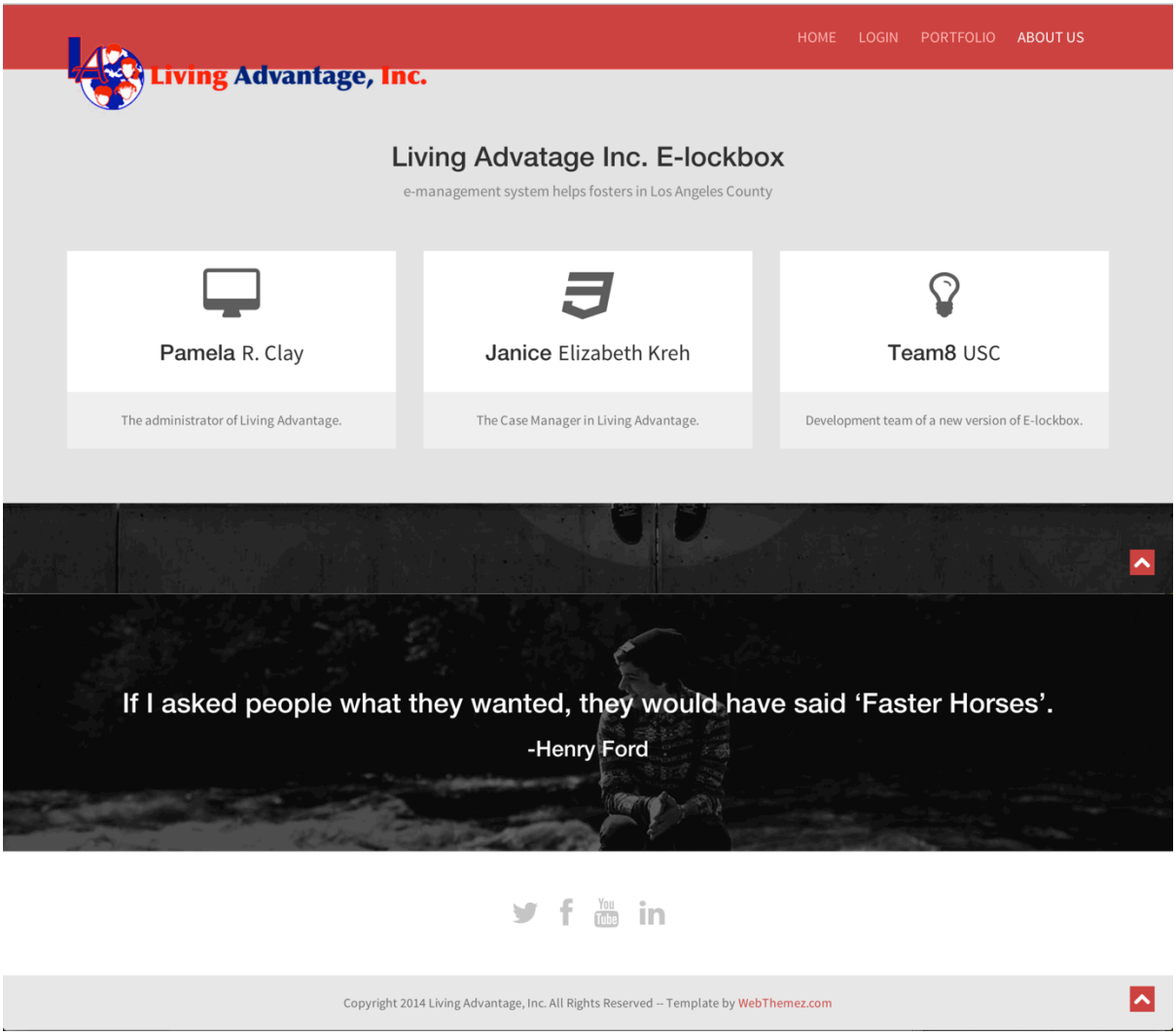


This is the login page that allows the users to login into system with more secure features are used such as Email verification. Also, this is page provides the contact information for users to direct contact LivingAdvantage office. Moreover, if the user forgot the password, then he or she can use link Forgot your password? That is to reset the password through emailed link. Email verification will send the four-digit verify code to email, which the user has to use it in order to login to system.

3.1.3 Portfolio

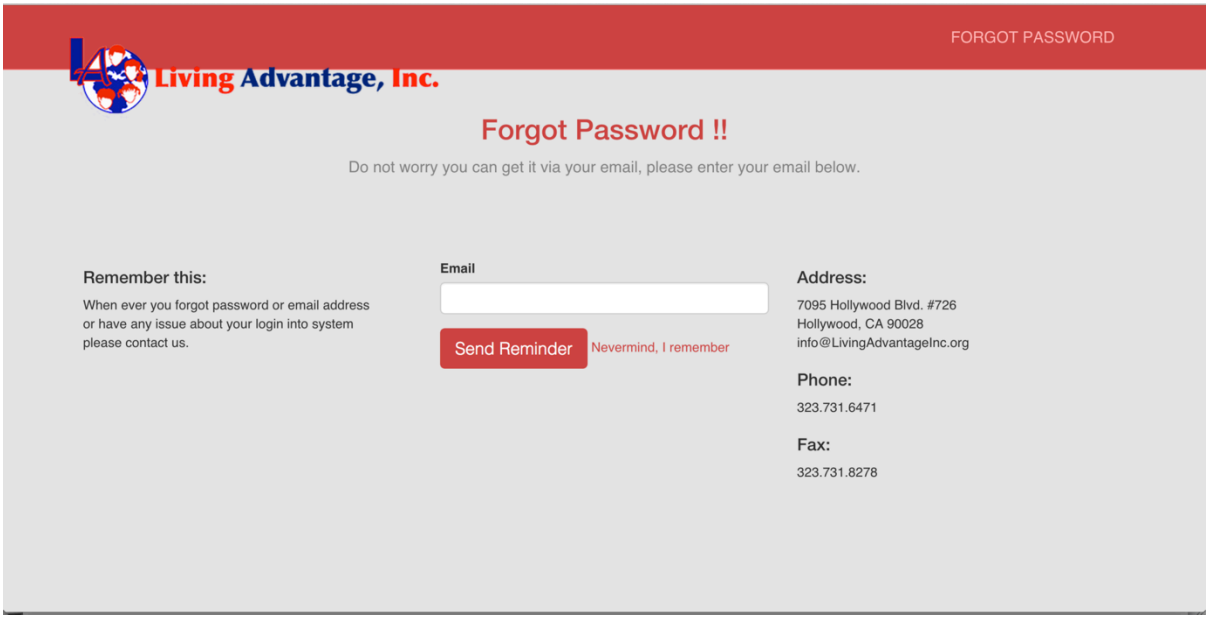


3.1.4 About Us

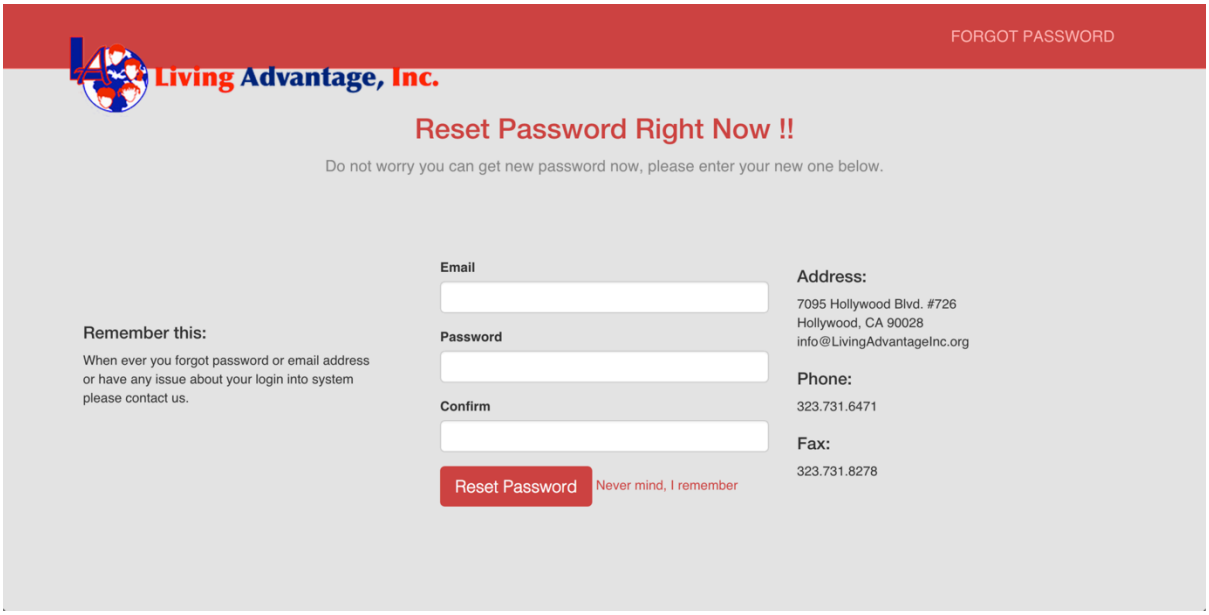


This is the About as page, which includes the names of administrator and case managers in Livingadvantage Inc. Also, there are the four important links of Livingadvantage Inc into Twitter, Facebook, Youtube, and Linkedln.

3.1.5 Remind and reset password page



This page is about the forgot password and reminded it. When user press link “Forgot password?” then this page is showed to user to reset his or her password via email address. Otherwise the user can return to login page



This page is when the user wants to change or reset a new password. This page is showed when the user press emailed link in his or her email. Also, the user can return back to login if he or she remembered the password.

3.2 User Management

3.2.1 Main page

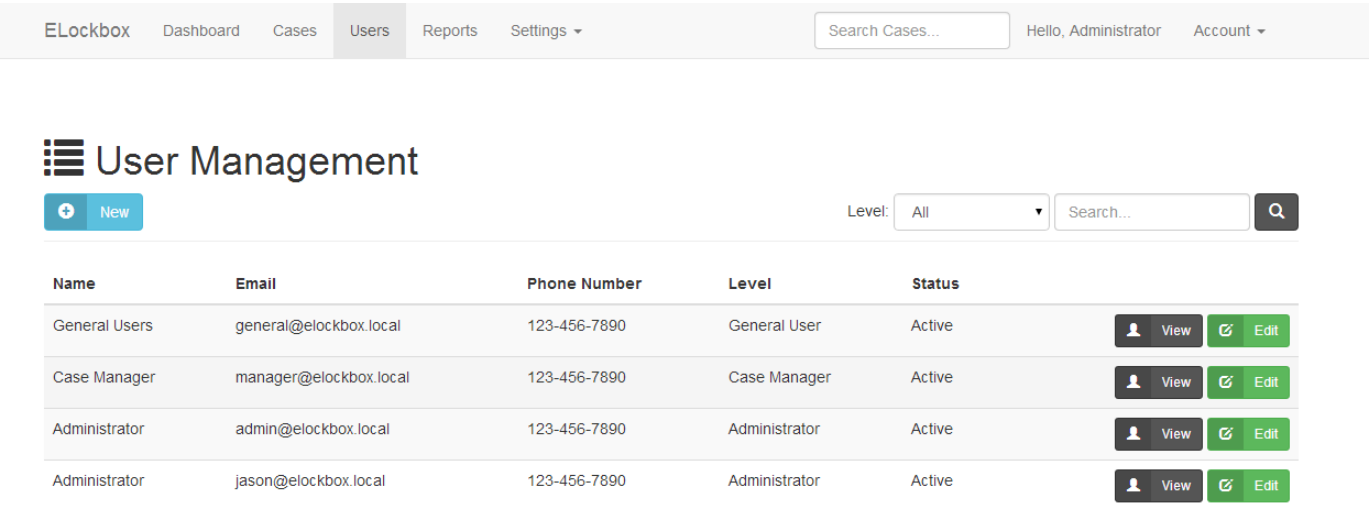


Figure 1 User management home page

After clicking the new button under the label 'User Management', the system would redirect to creating a new user page(Chapter 1.2). At the right of the home page, there is a level filter and a search text field for searching(Chapter 1.3). The system lists all users sorted by their level and status, including users' name, email, phone-number, level and status. There are two buttons at the right of a item. The view button is used for viewing one user's information (Chapter 1.4). The edit button is used for editing user's information (Chapter 1.5).

3.2.2 Create new user page

Creating a new user needs user's basic information, like first name, last name, email, address, etc...Furthermore, an administrator can set a username and a password for the new user. The system would set the new user's status as active, and the administrator should set the new user's level.

The save button at the bottom of the page is used for saving information of the new user. The system would provide success messages or error messages for the administrator according to the process responses. The information in the form like phone number or email have fixed format, and the system would check them when the administrator submit the information.

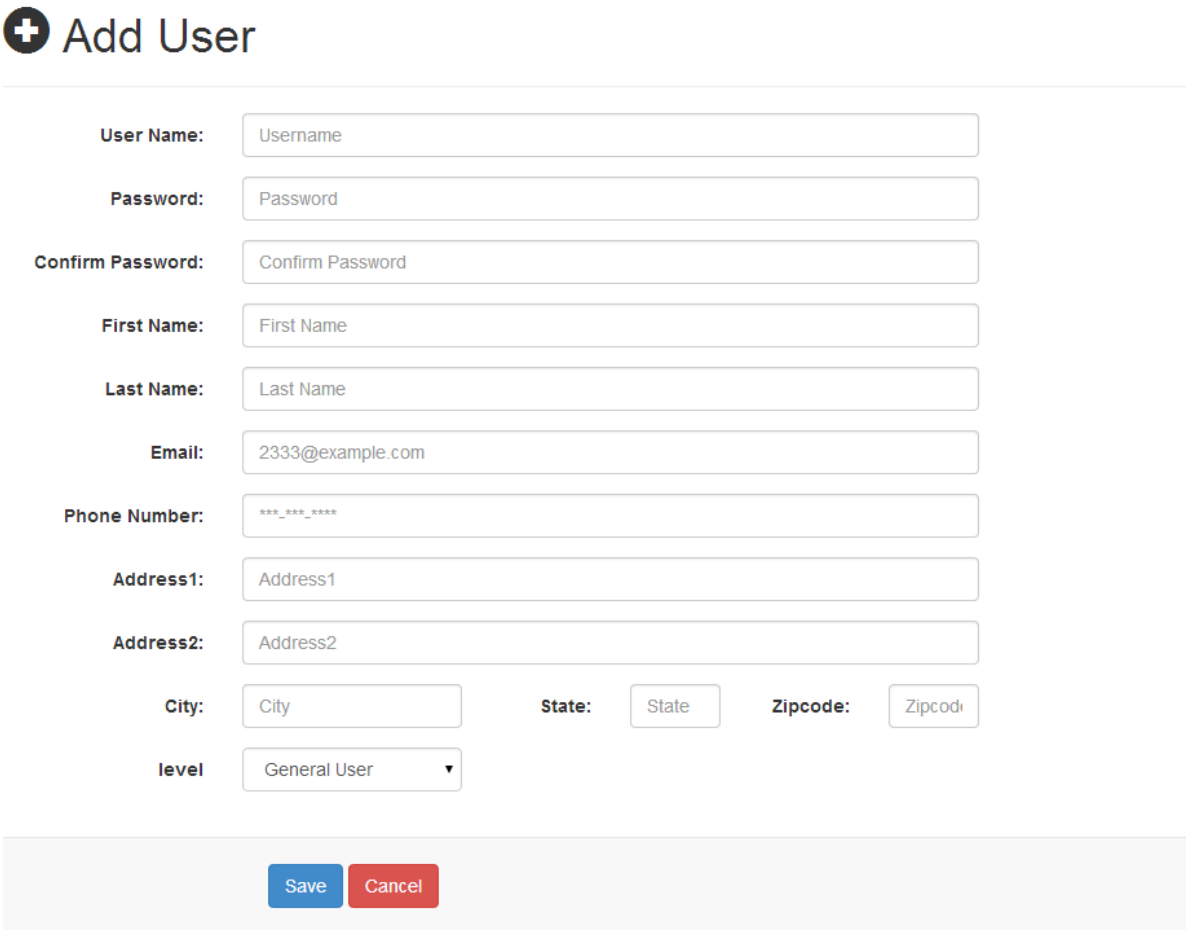


Figure 2 Add a new user page

3.2.3 Filter and search

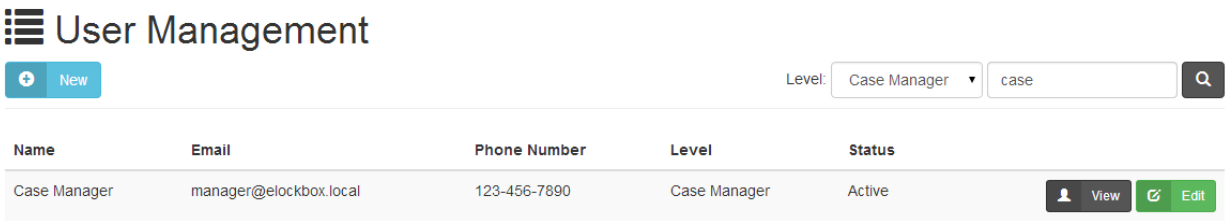


Figure 3 Results after using filters and search field

In the system, we have two kinds of filters. One is a level filter. The administrator can choose people with a same level. The other one is a text field. The administrator can use a user's first name, last name or email as a search criteria. After clicking the search button, the system would return expected information.

3.2.4 View user information

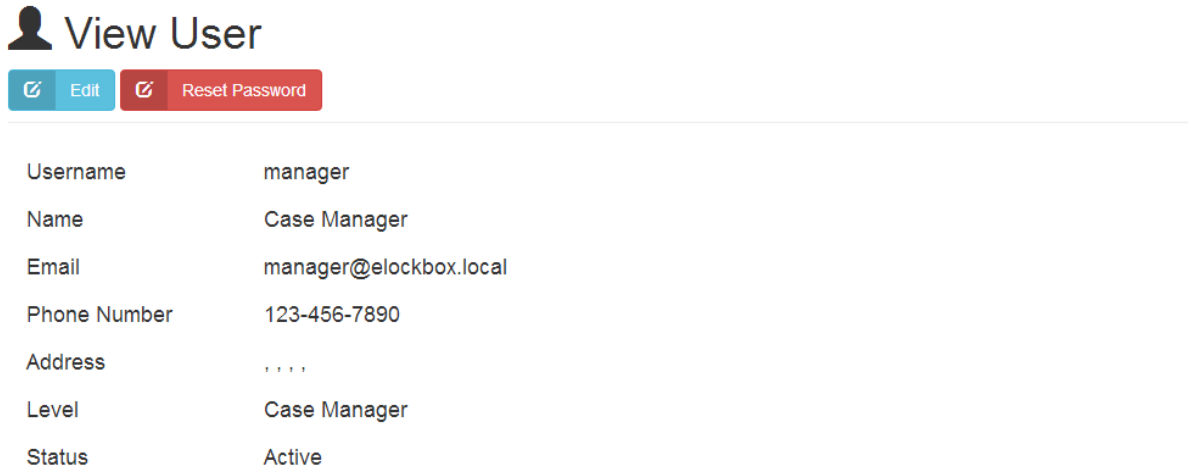


Figure 4 View user information

There are two buttons in the view user information page, edit button and reset password button. Edit button is same to the edit button in the home page. Reset password button is used for the administrator resetting password for a specific user.

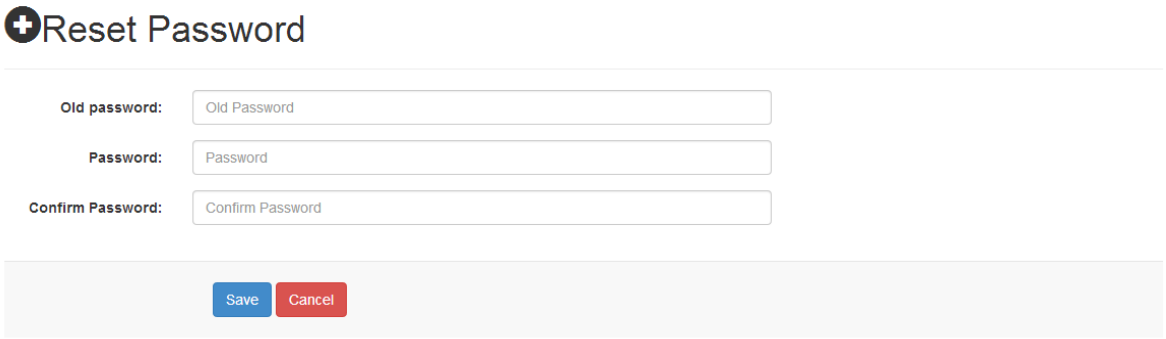


Figure 5 Reset password page

3.2.5 Edit user information

Administrator can change all information for a user. In Figure 6.

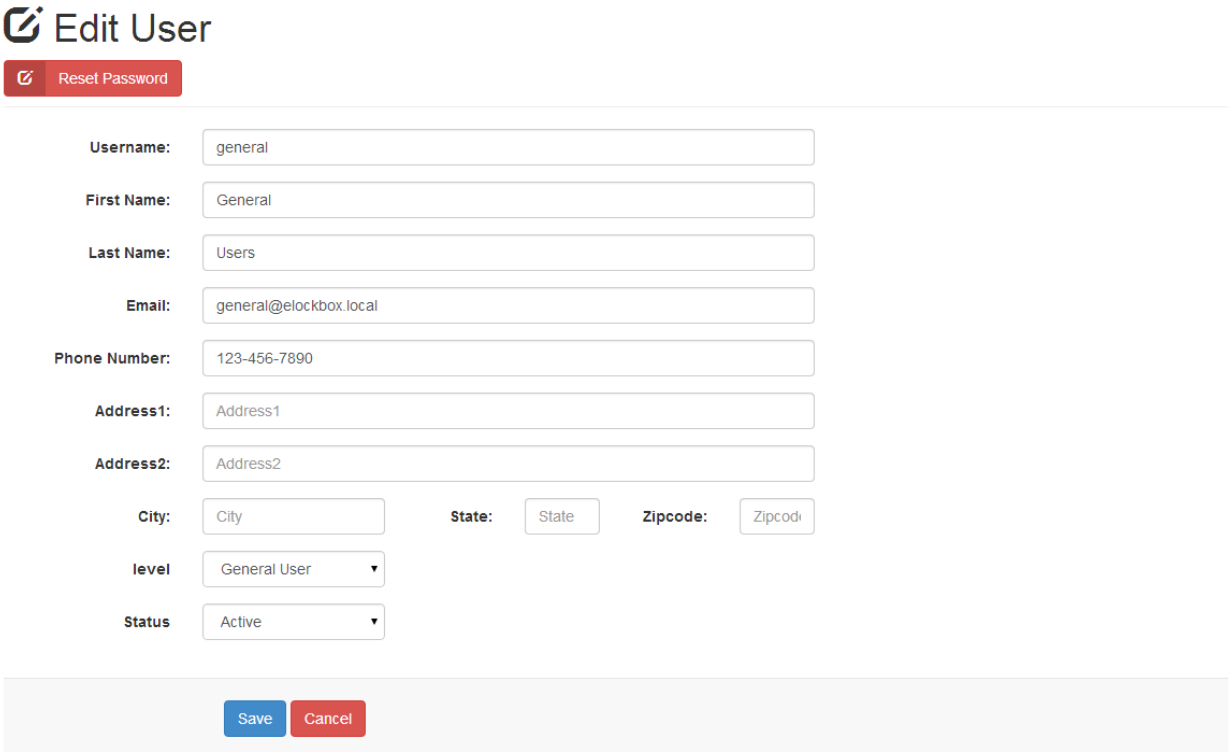
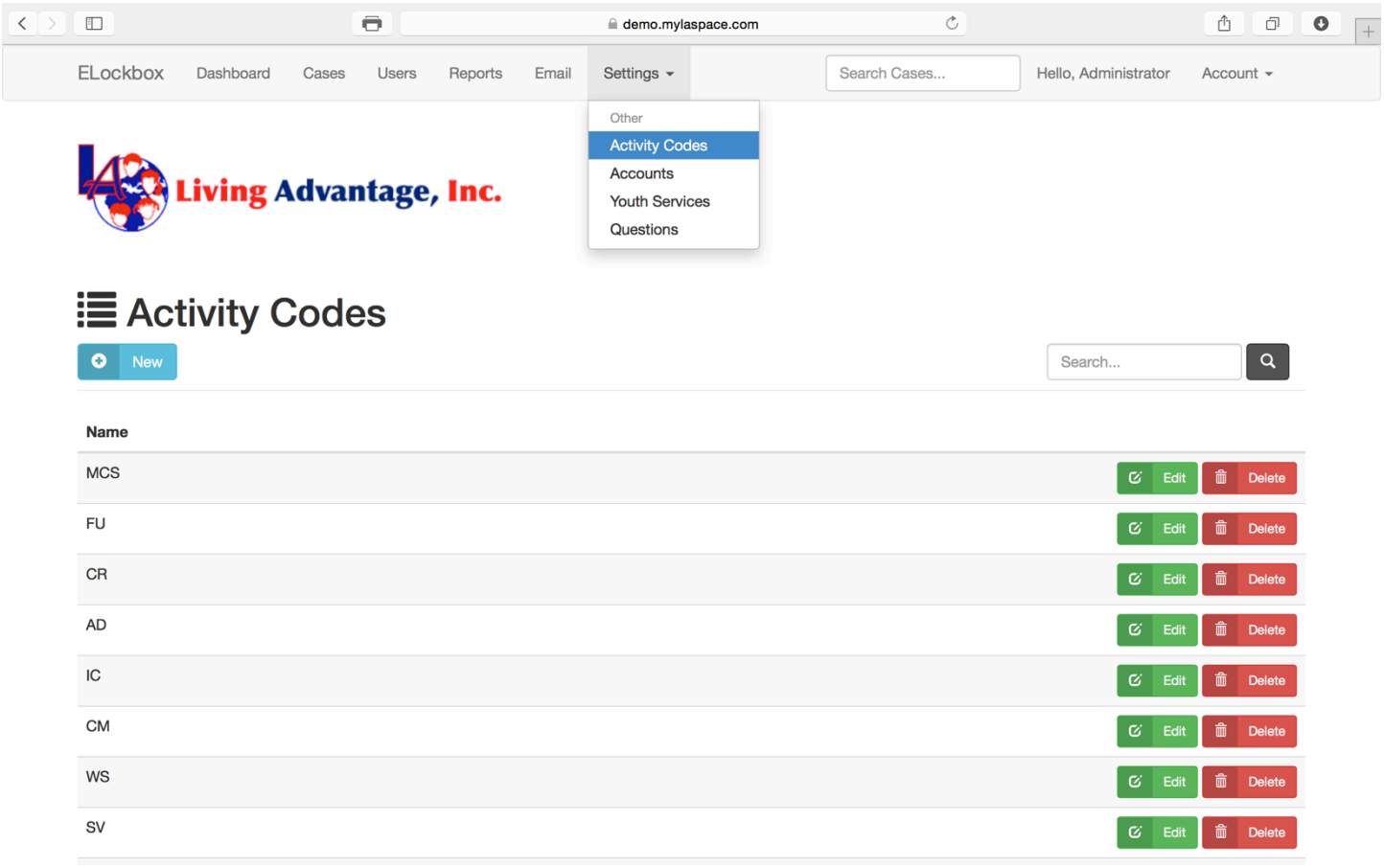


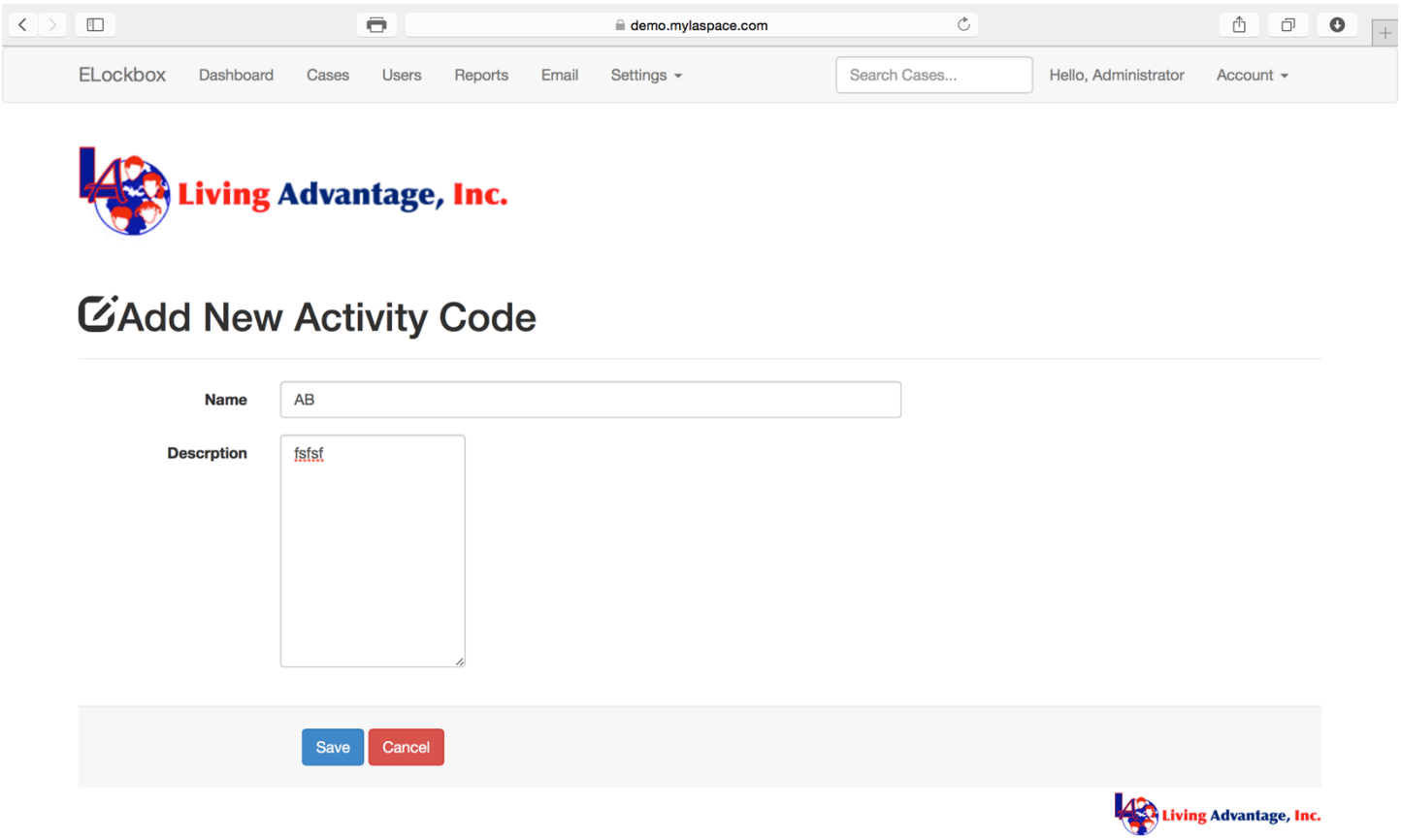
Figure 6 Edit user information

3.3 Case Management

3.3.1 Add/Delete Activity Codes

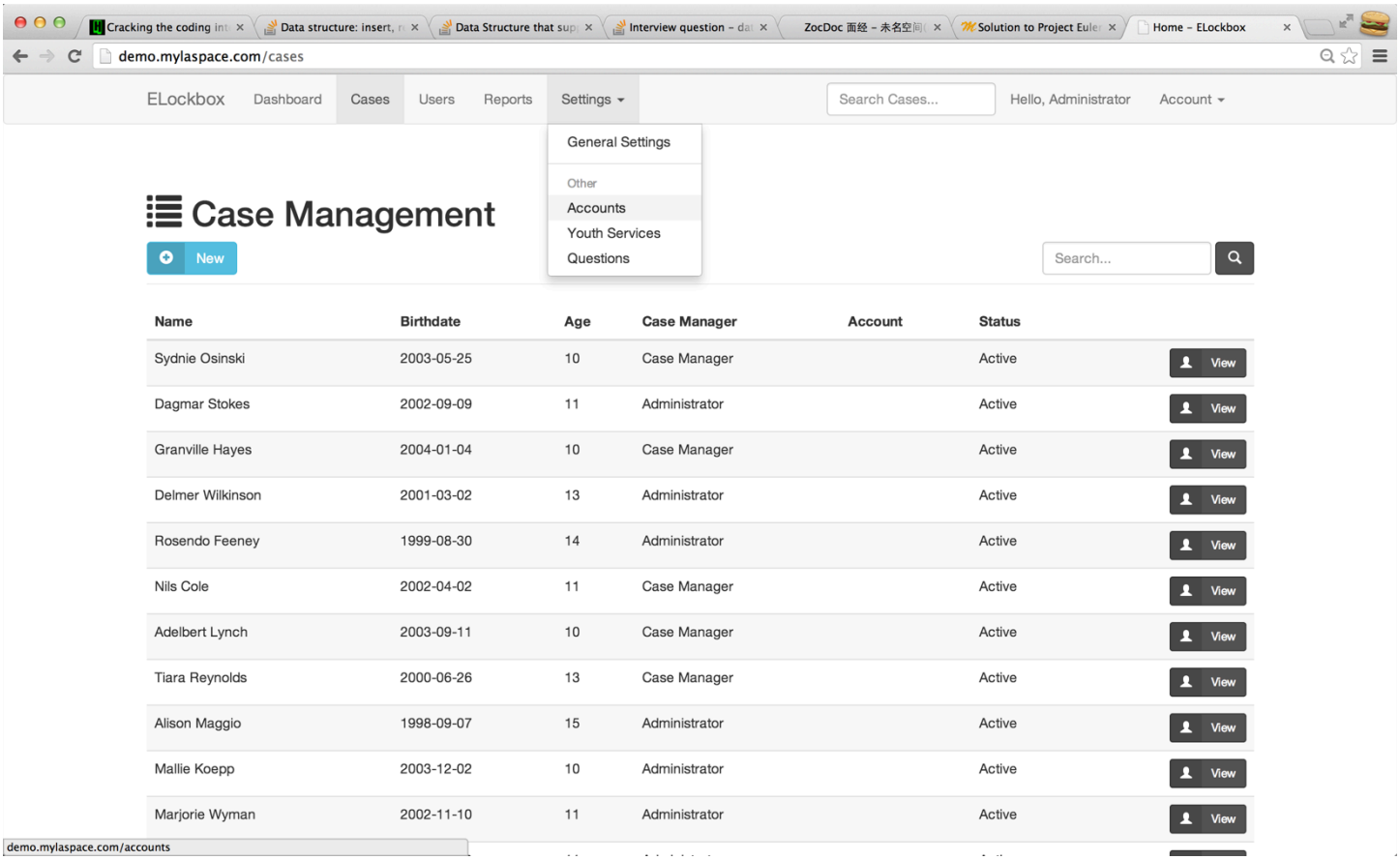


Under Settings dropdown menu, admistrators can click Activity Codes to go to Activity Codes Main Page.

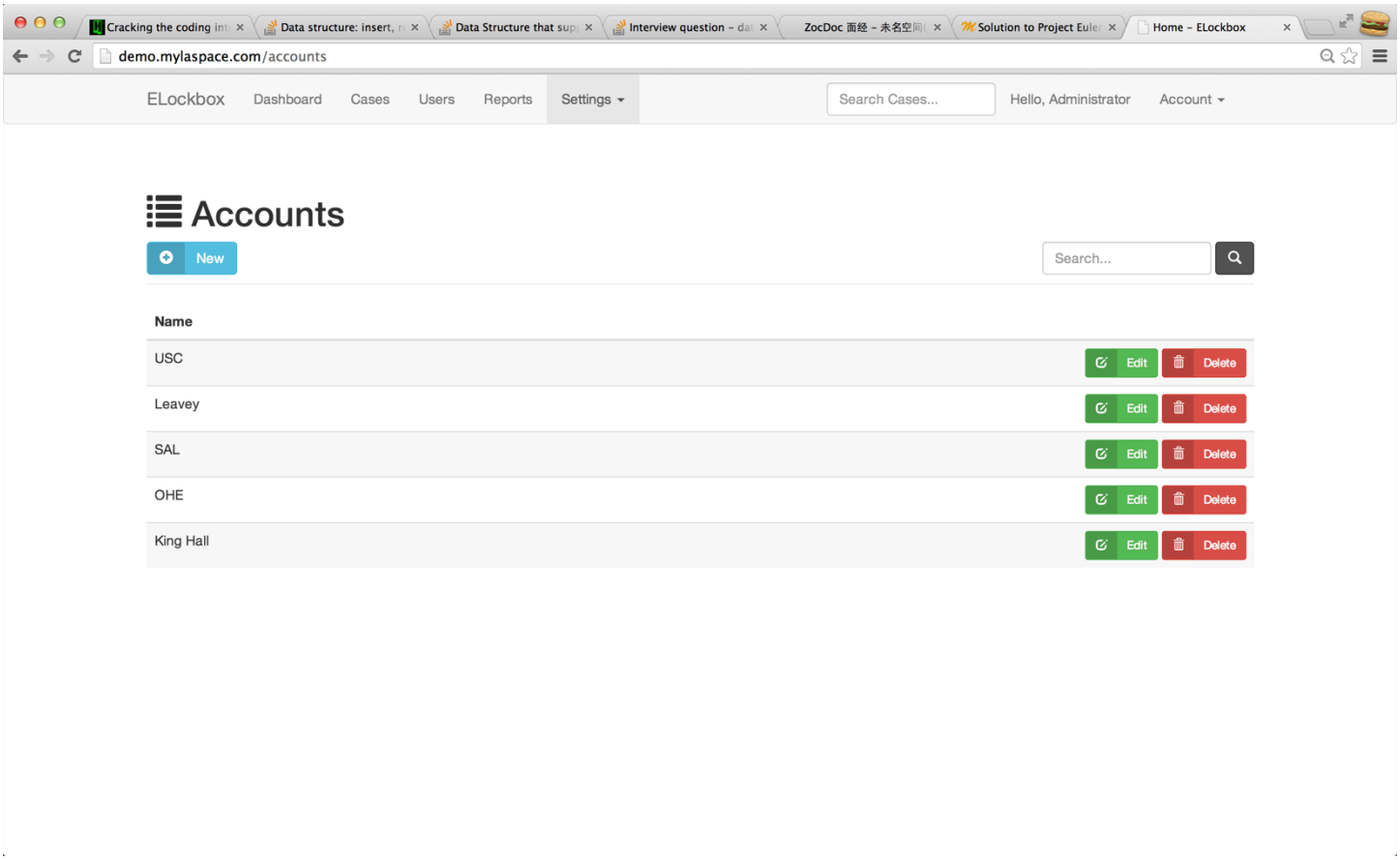


After clicking the New button, administrator can enter Name and Description to create a new Activity Code. Editing an exiting Activity Code is similar to this.

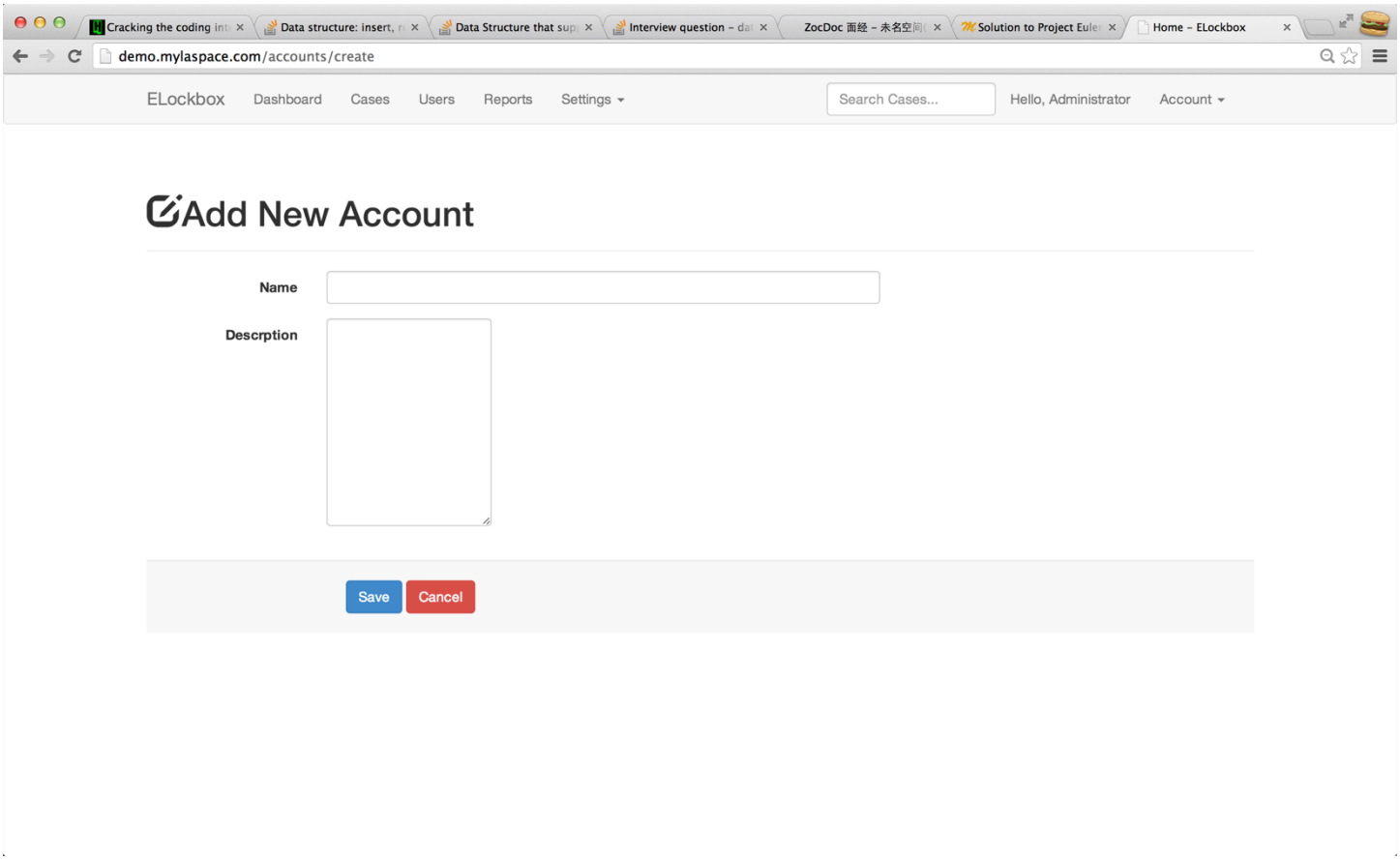
3.3.2 Add/Delete Accounts



Under Settings dropdown menu, admistrators can click Accounts to go to Accounts Main Page.

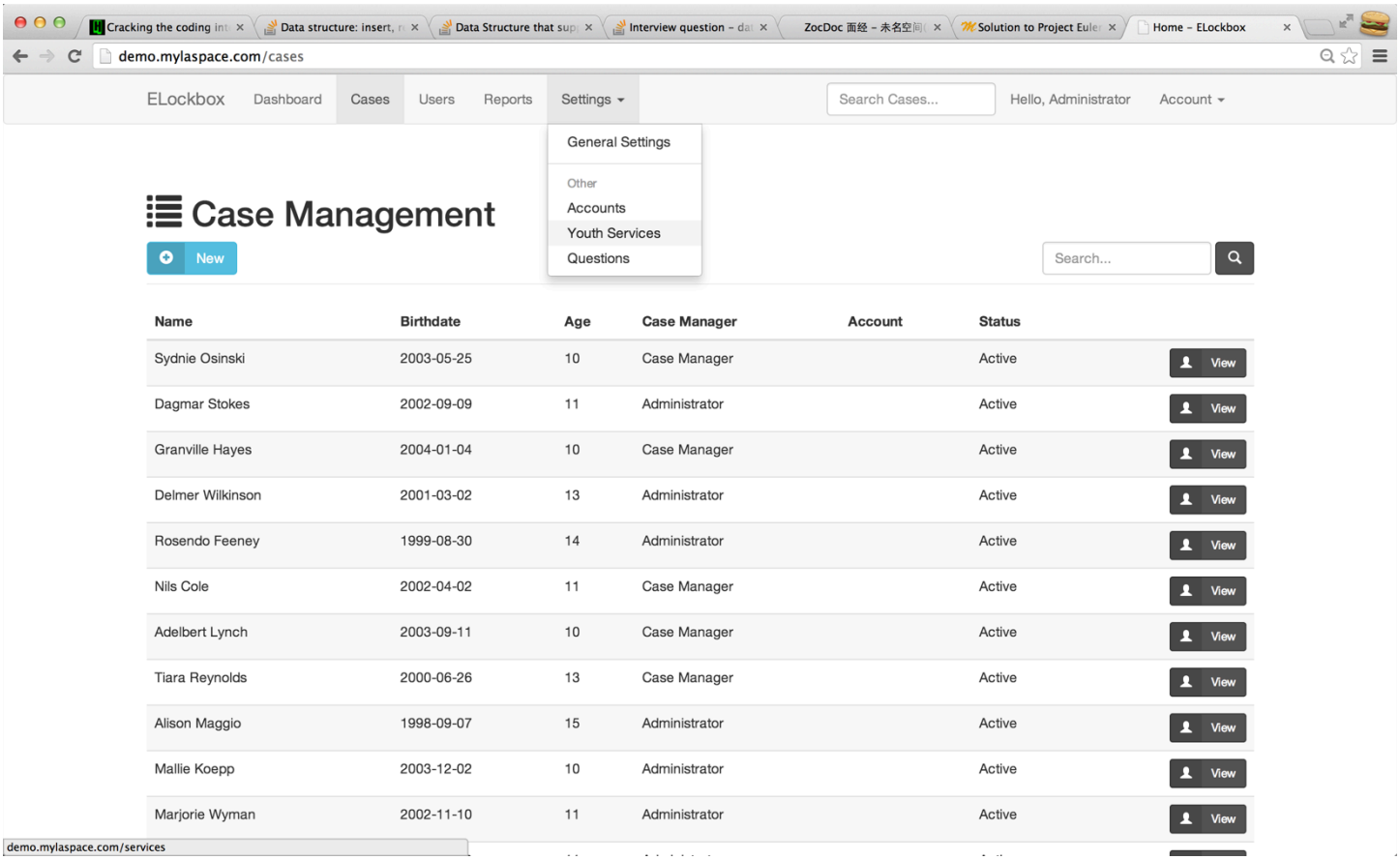


In the Accounts Main Page, New button is for creating a new Account, Edit button is for editing an exiting Account, Delete button is for deleting an exiting Account.

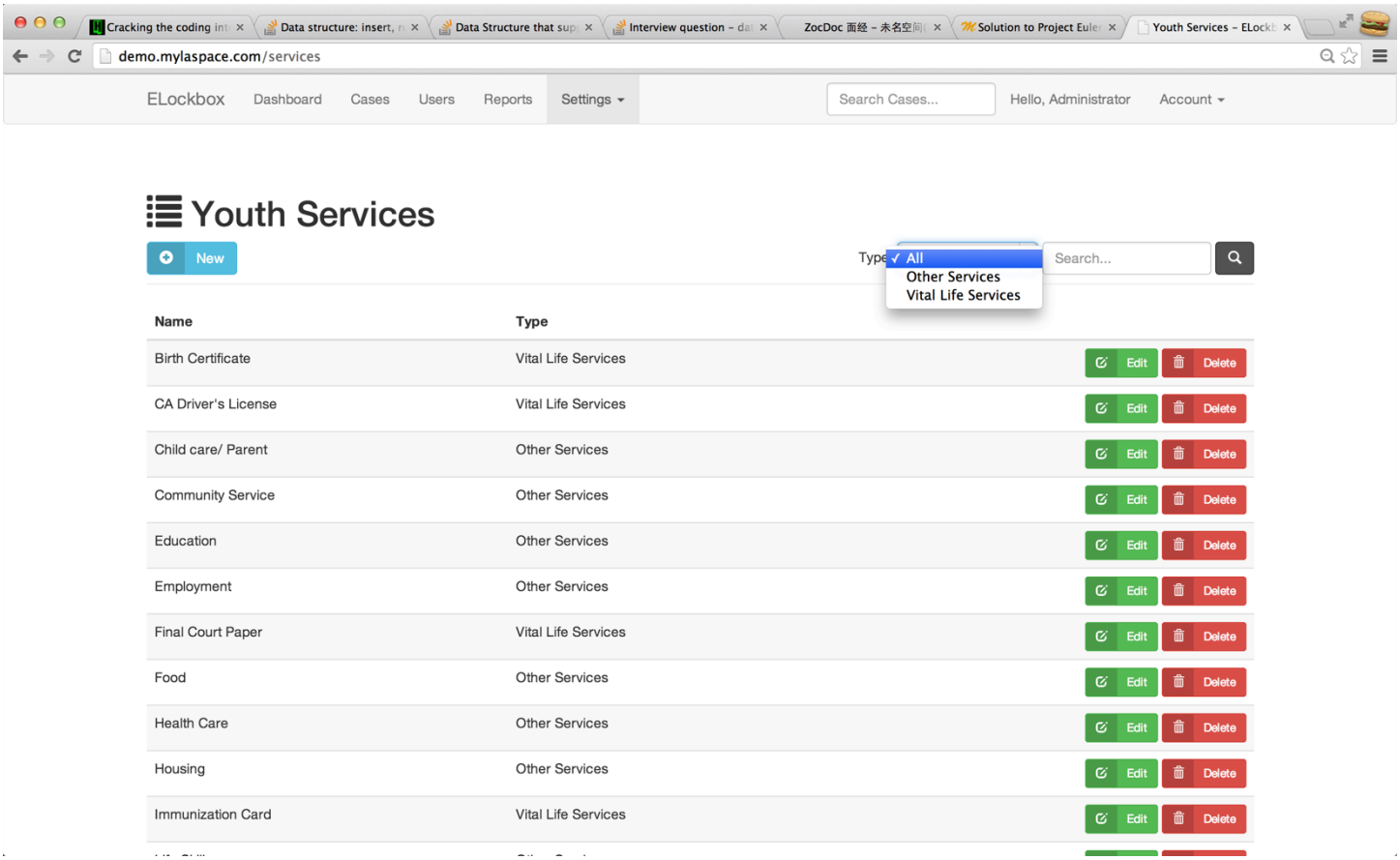


After clicking the New button, administrator can enter Name and Description to create a new Account. Edit an exiting Account is similar to this.

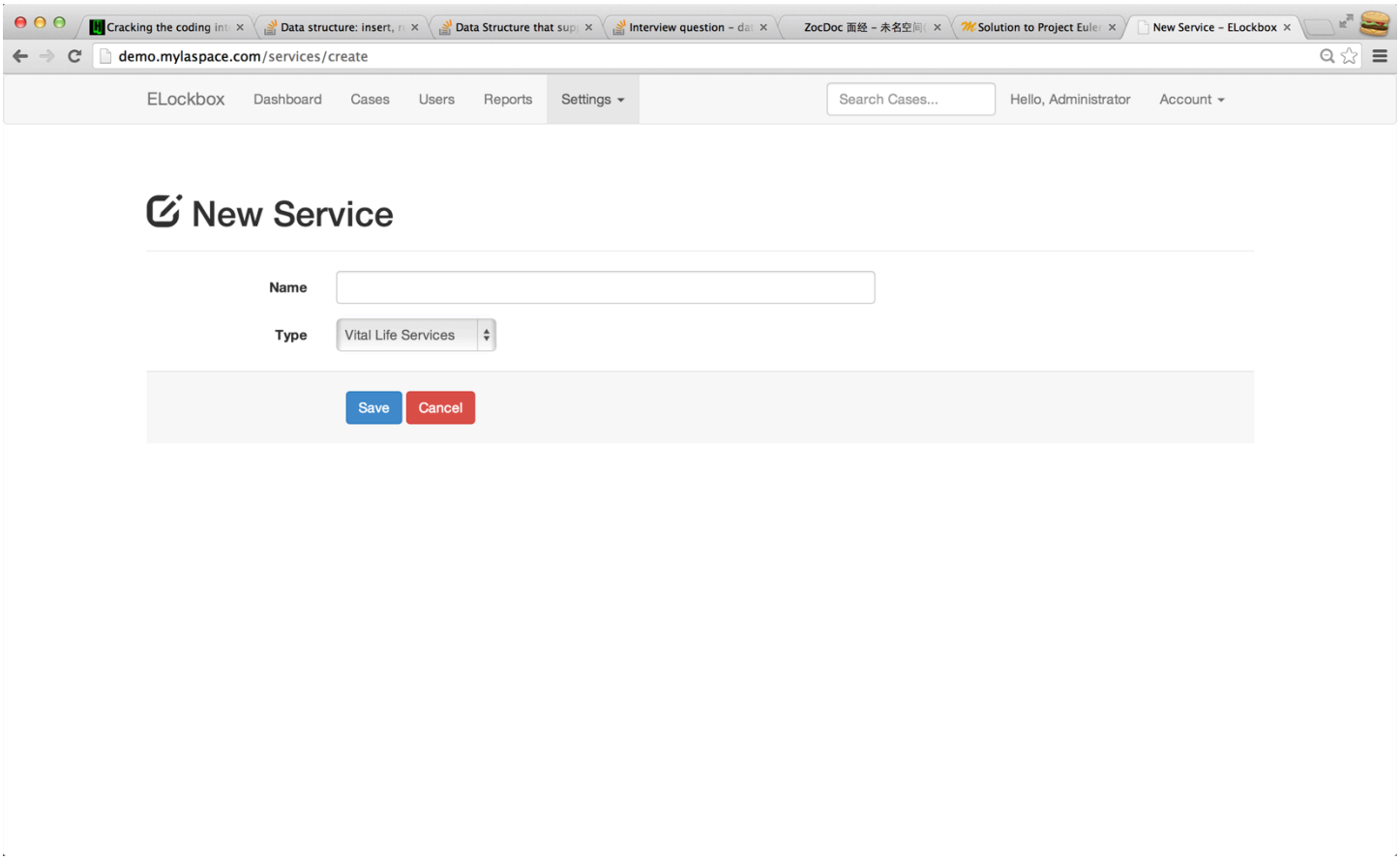
3.3.3 Search/Add/Delete Youth Services



Under Settings dropdown menu, admistrators can click Youth Services to go to Youth Services Main Page.

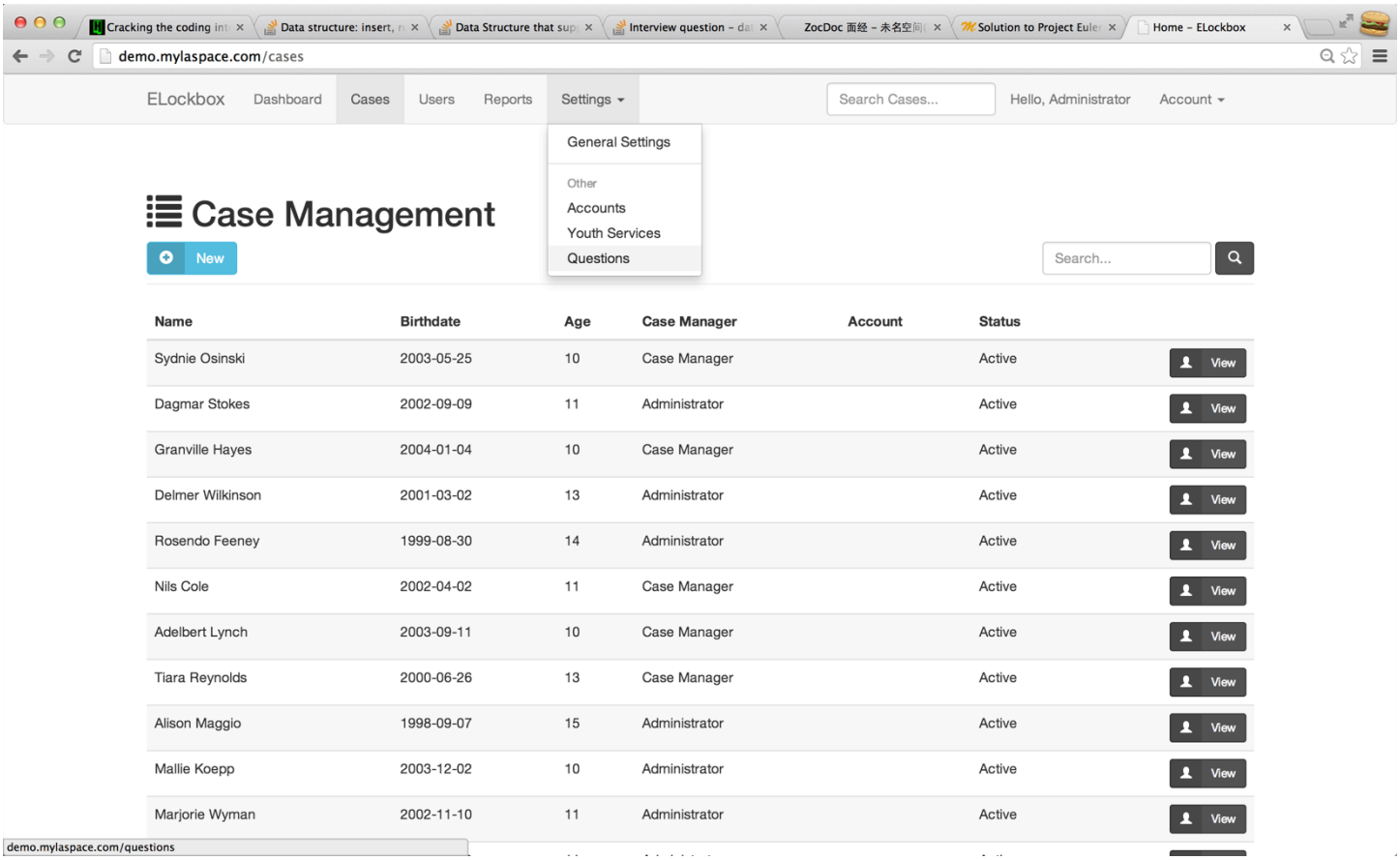


In the Youth Services Main Page, New button is for creating a new Youth Service, Edit button is for editing an exiting Youth Service; Delete button is for deleting an exiting Youth Service. Administrator can select a Youth Service type and enter certain key words to search for certain youth cases.

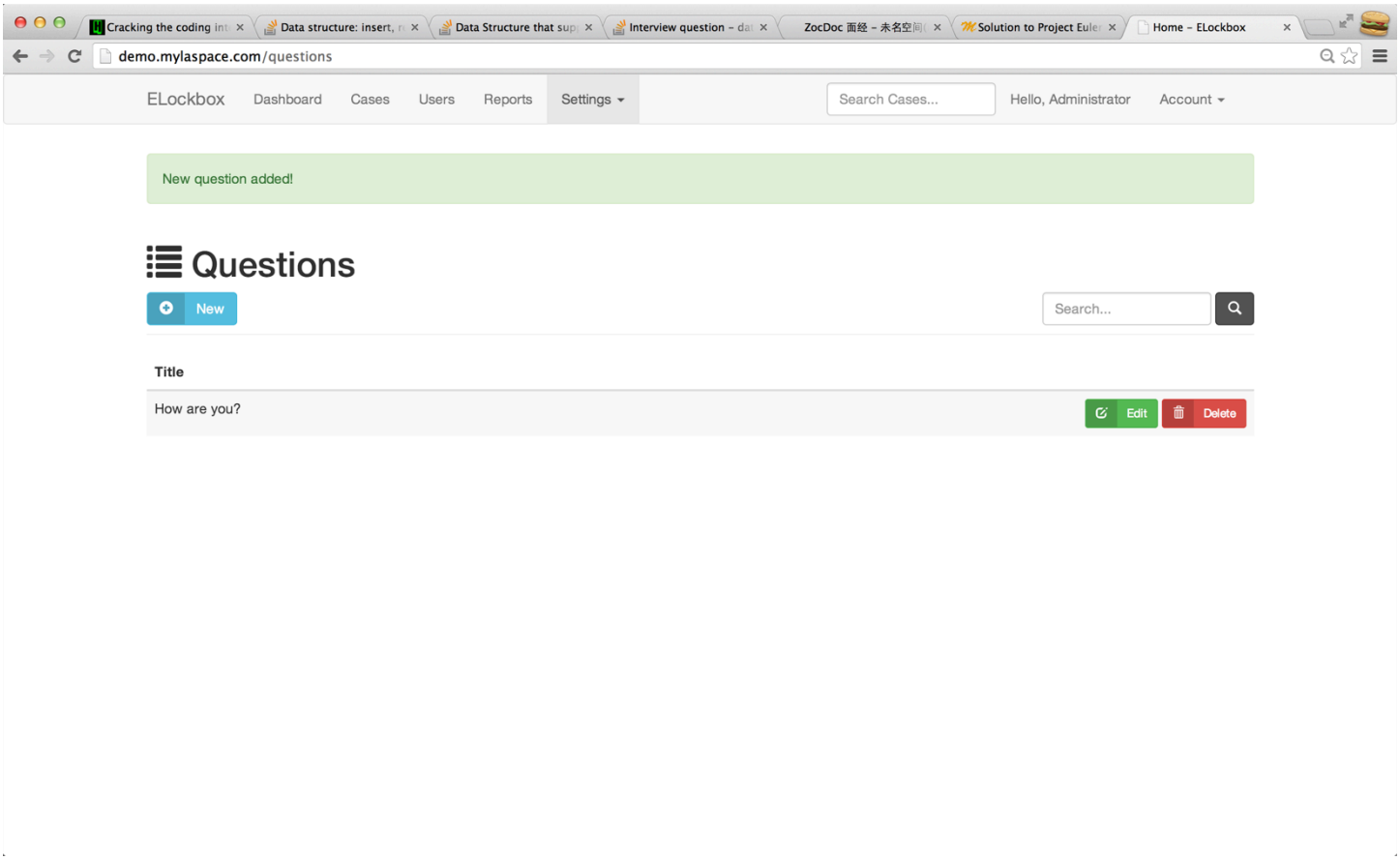


After clicking the New button, administrator can enter Name and select a Type to create a new Youth Service. Edit an exiting Youth Service is similar to this.

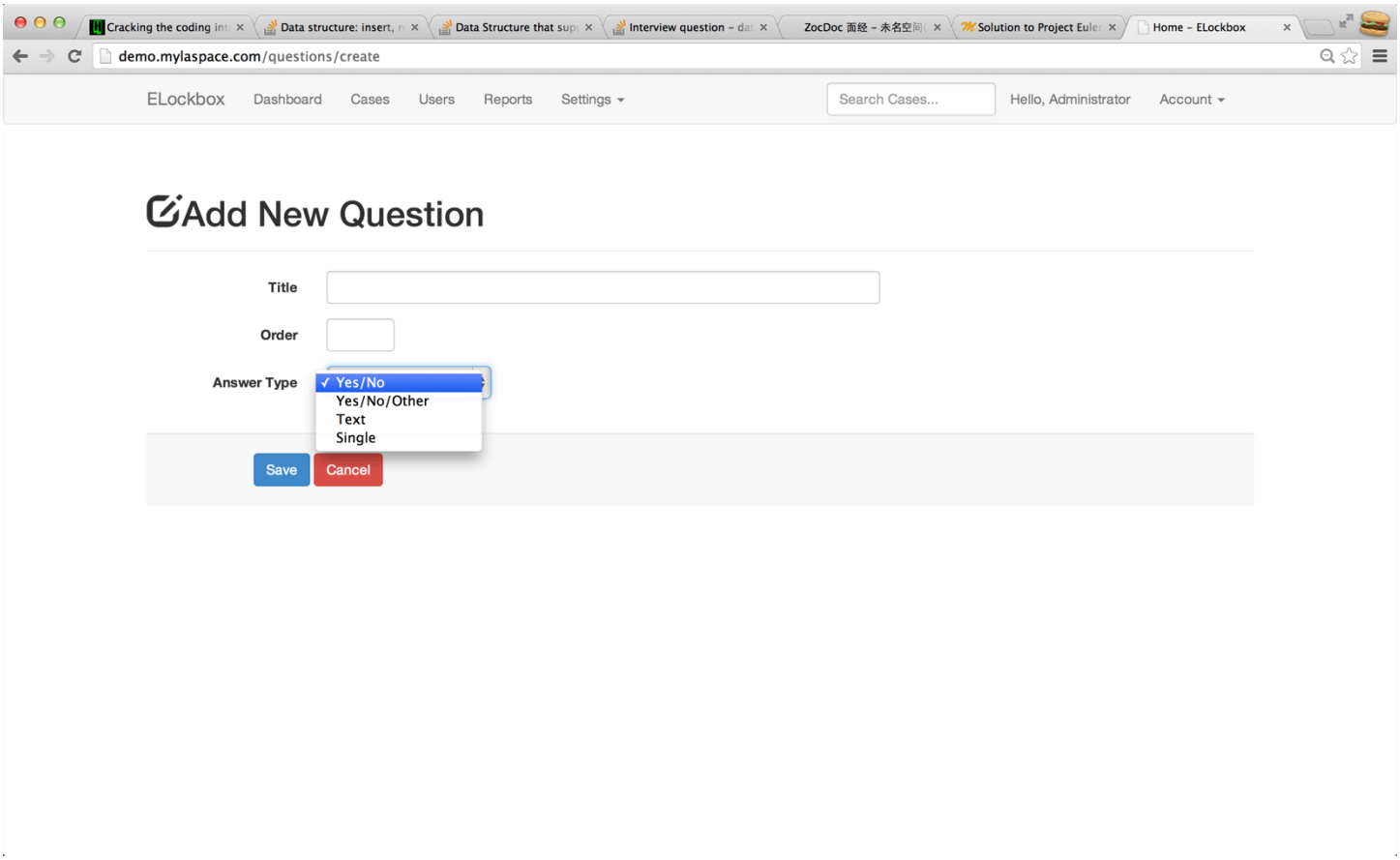
3.3.4 Add/Delete Questions



Under Settings dropdown menu, admistrators can click Questions to go to Questions Main Page.

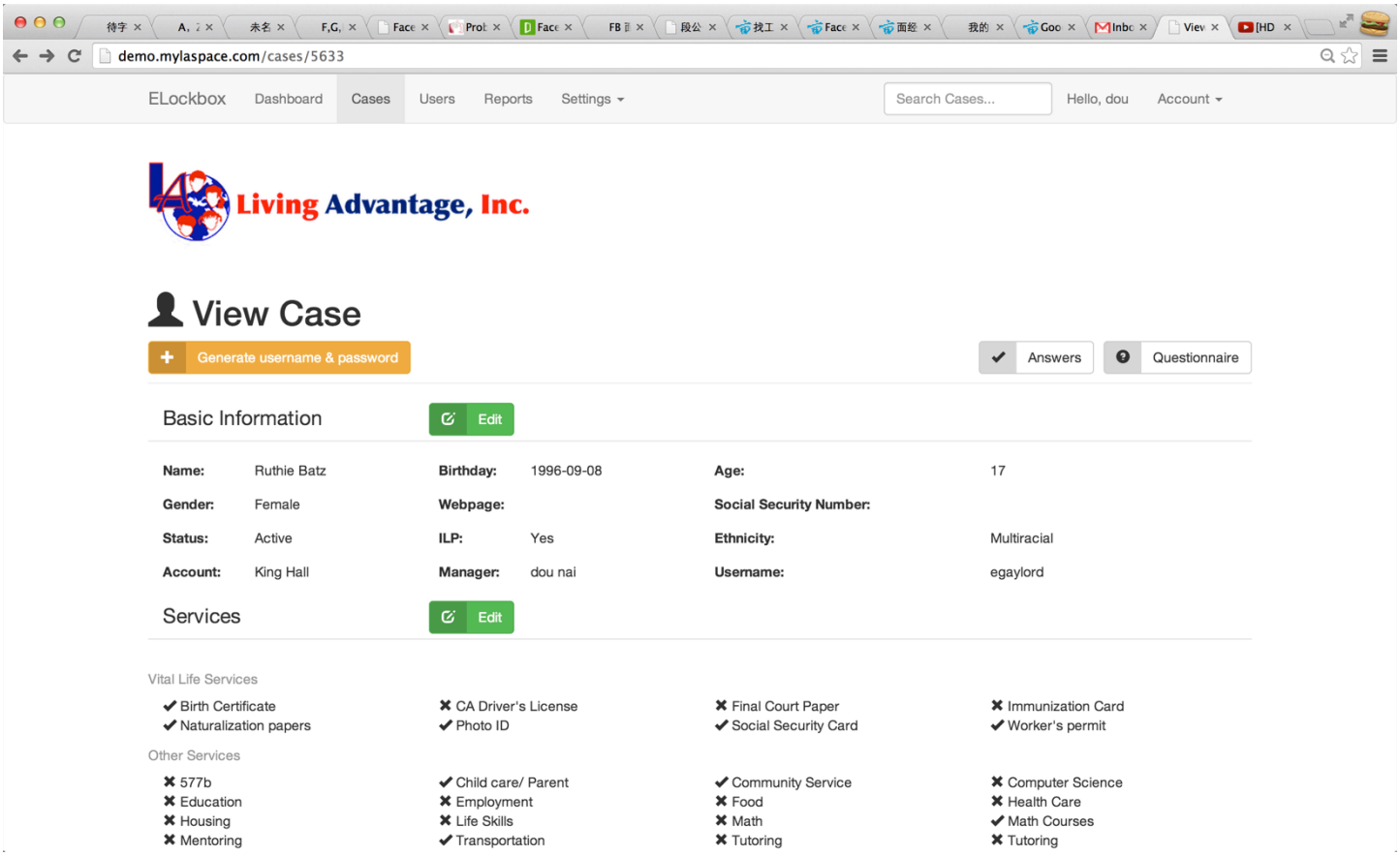


In the Questions Page, New button is for creating a new Question, Edit button is for editing an exiting Questions, Delete button is for deleting an exiting Question.

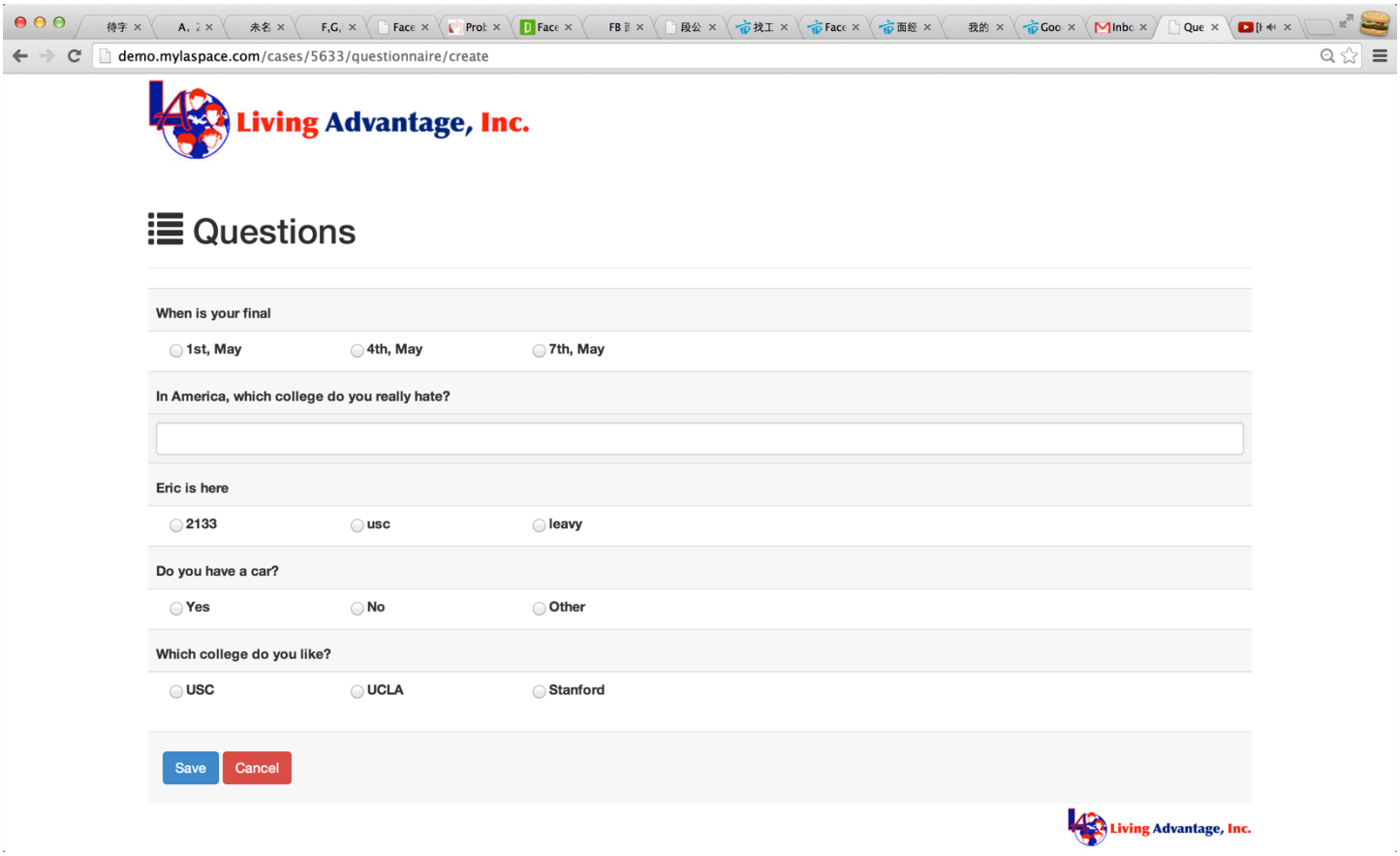


After clicking the New button, administrator can enter Title and Integer Order for displaying Question in the nth place, and select an Answer Type to create a new Question. Edit an exiting Question is similar to this.

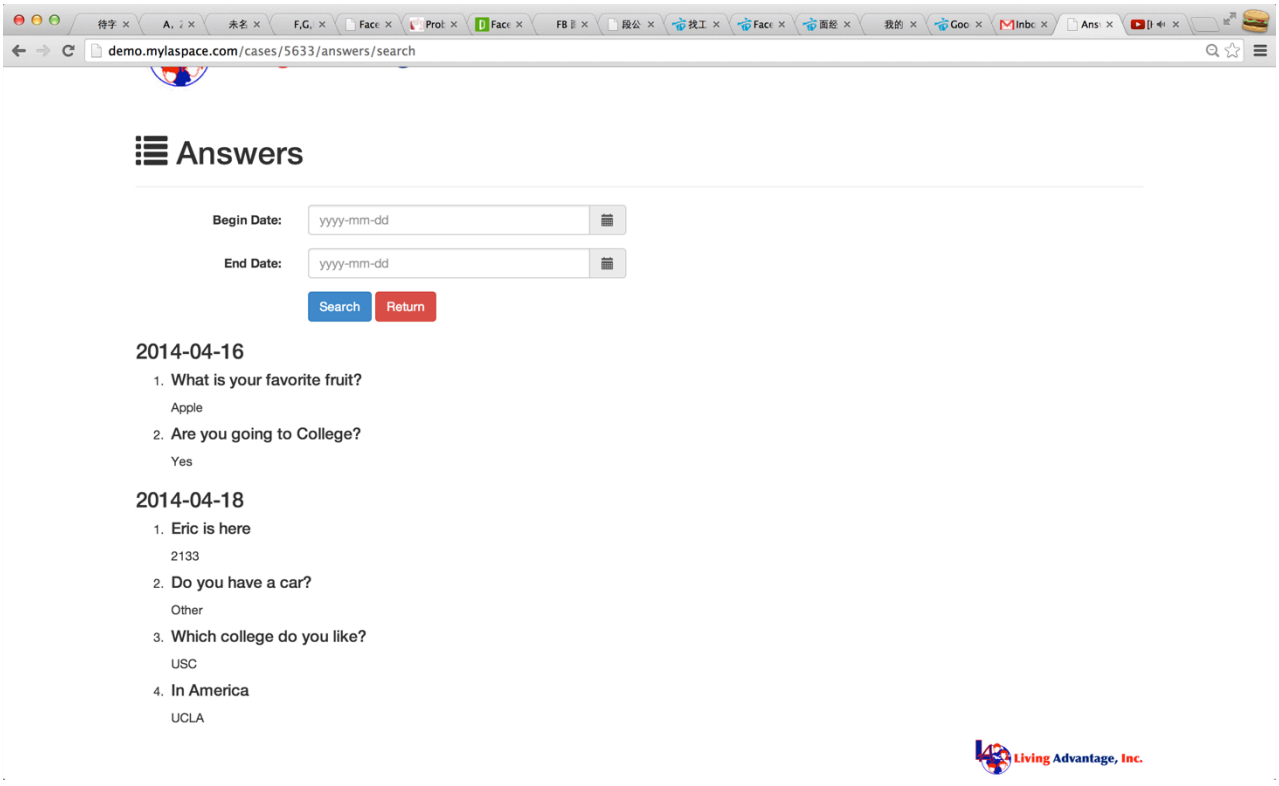
3.3.5 Answer Questions & See Answers History



In View Case page, Questionnaire button is for answering questions, Answers button is to show all question answering history record.

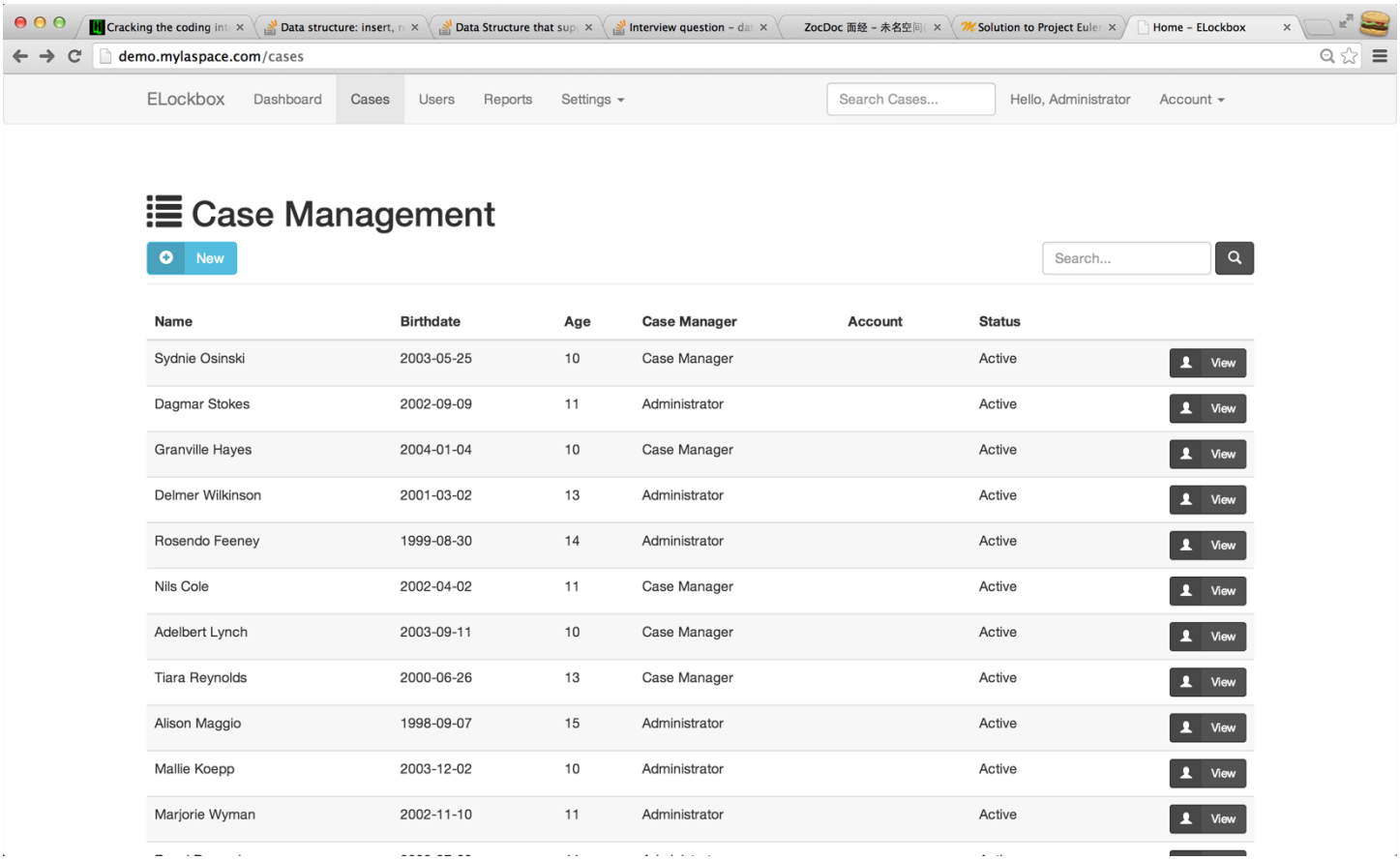


After clicking the Questionnaire button, user can answer all assigned questions.

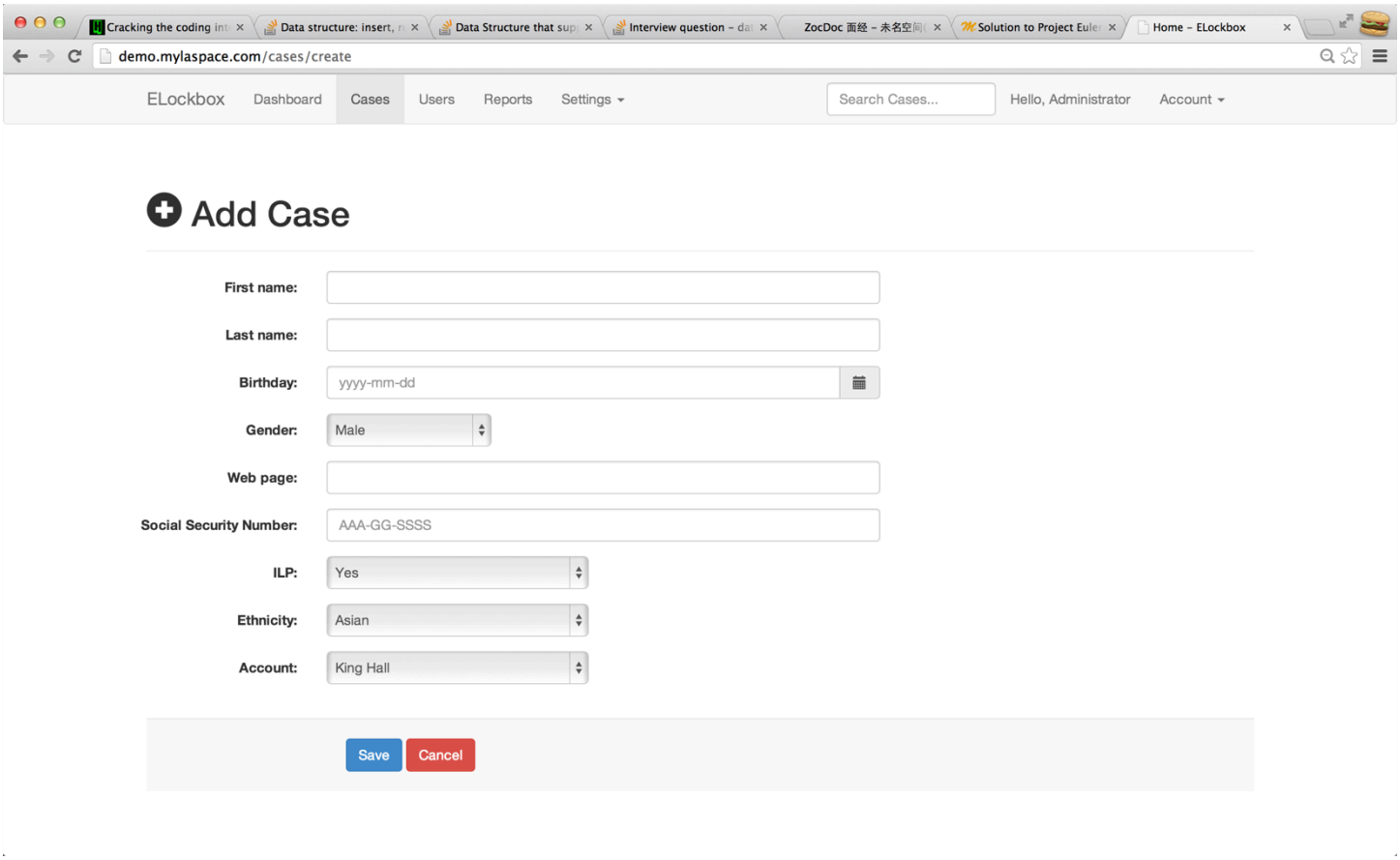


User can use Begin Date and End Date filter to see all Answers history record during the selected period.

3.3.6 Add Cases

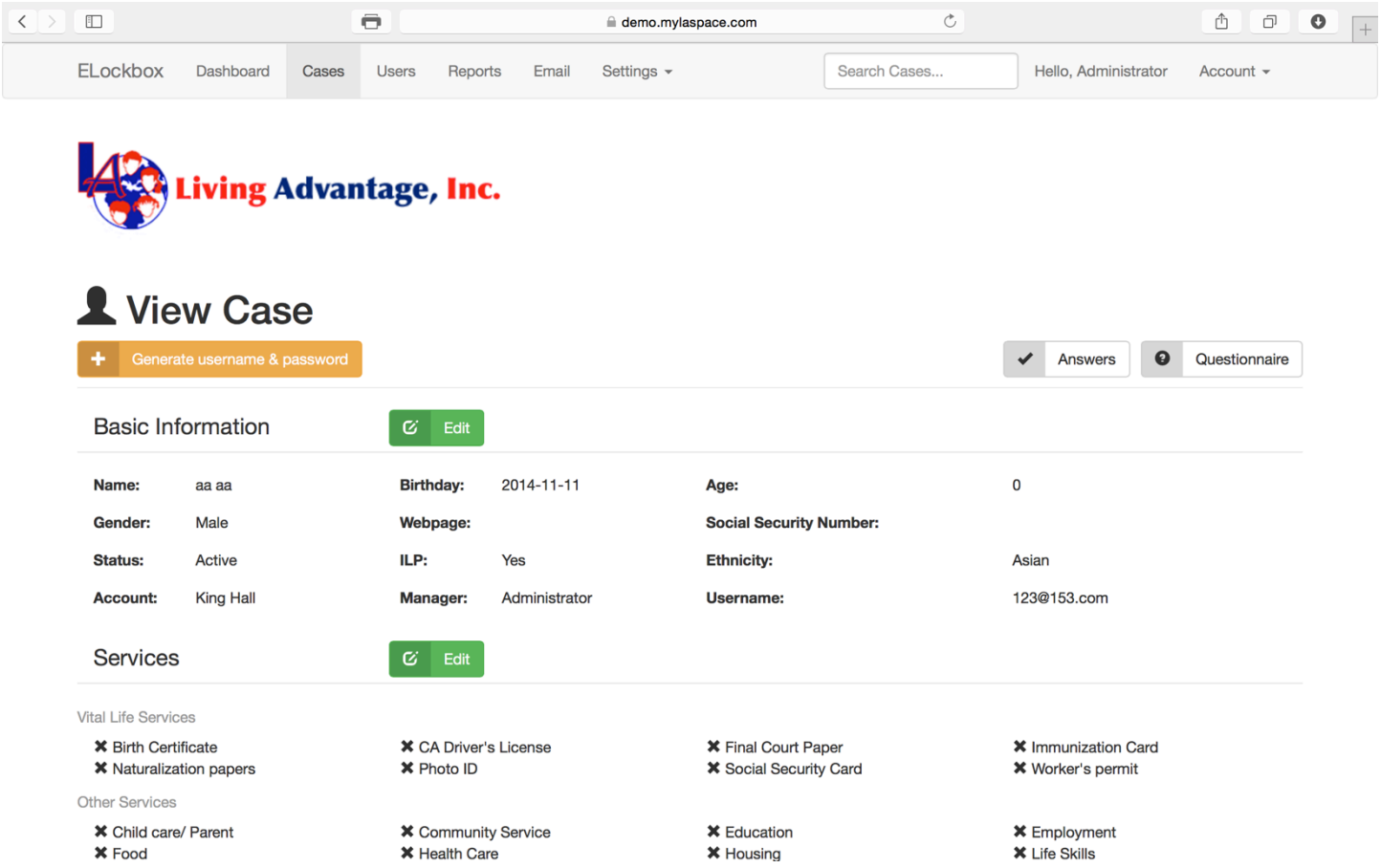


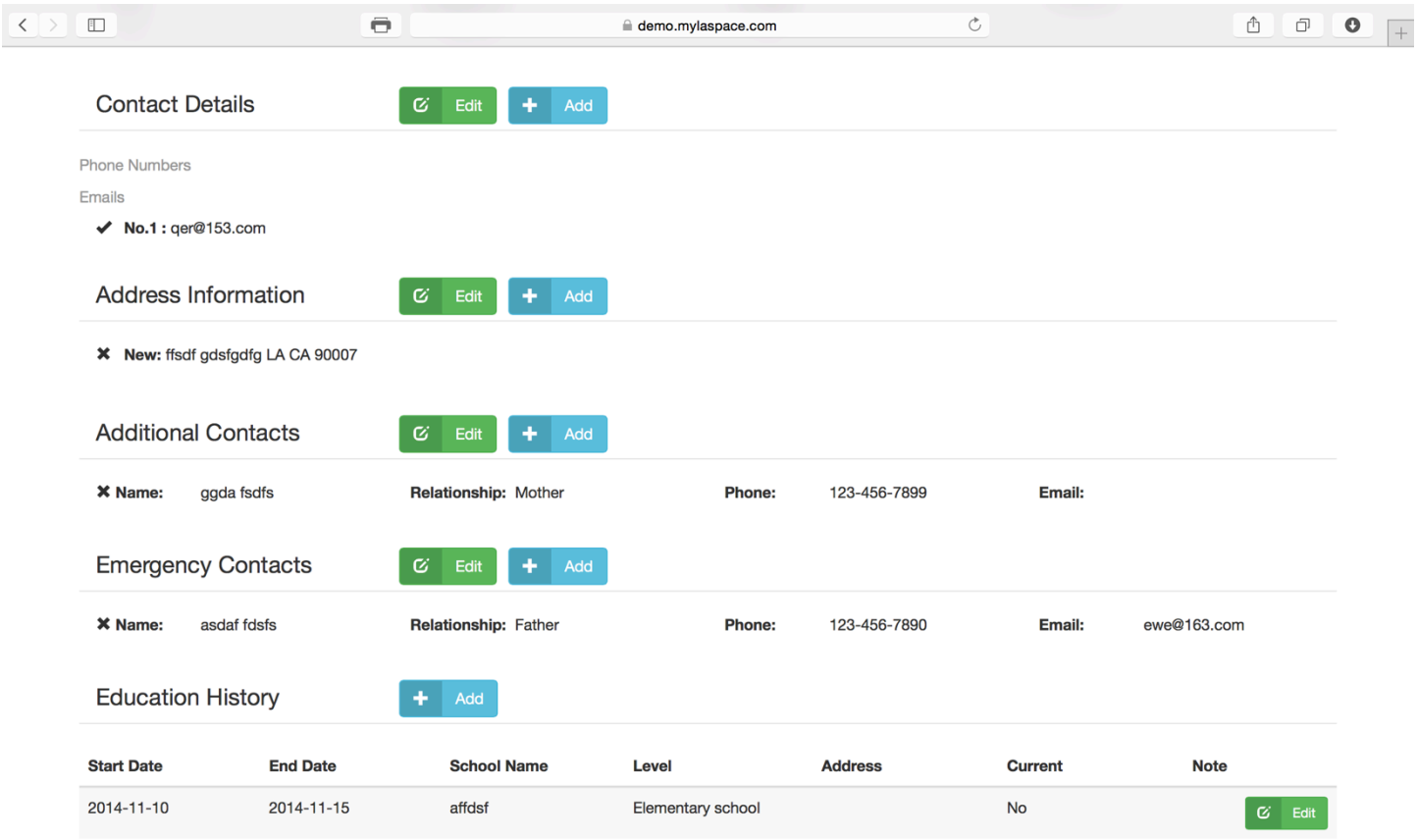
In the Case Mangement Main Page, New button is for creating a Case. View button is for viewing detailed information of a Case. Admistrator can enter keywords in the search bar to find certain Cases.



After clicking the New button, admistrator can enter information required to create a new Case. Account type is from Accouts described above.

After clicking the View button, the complete information of a Case is diplayed.

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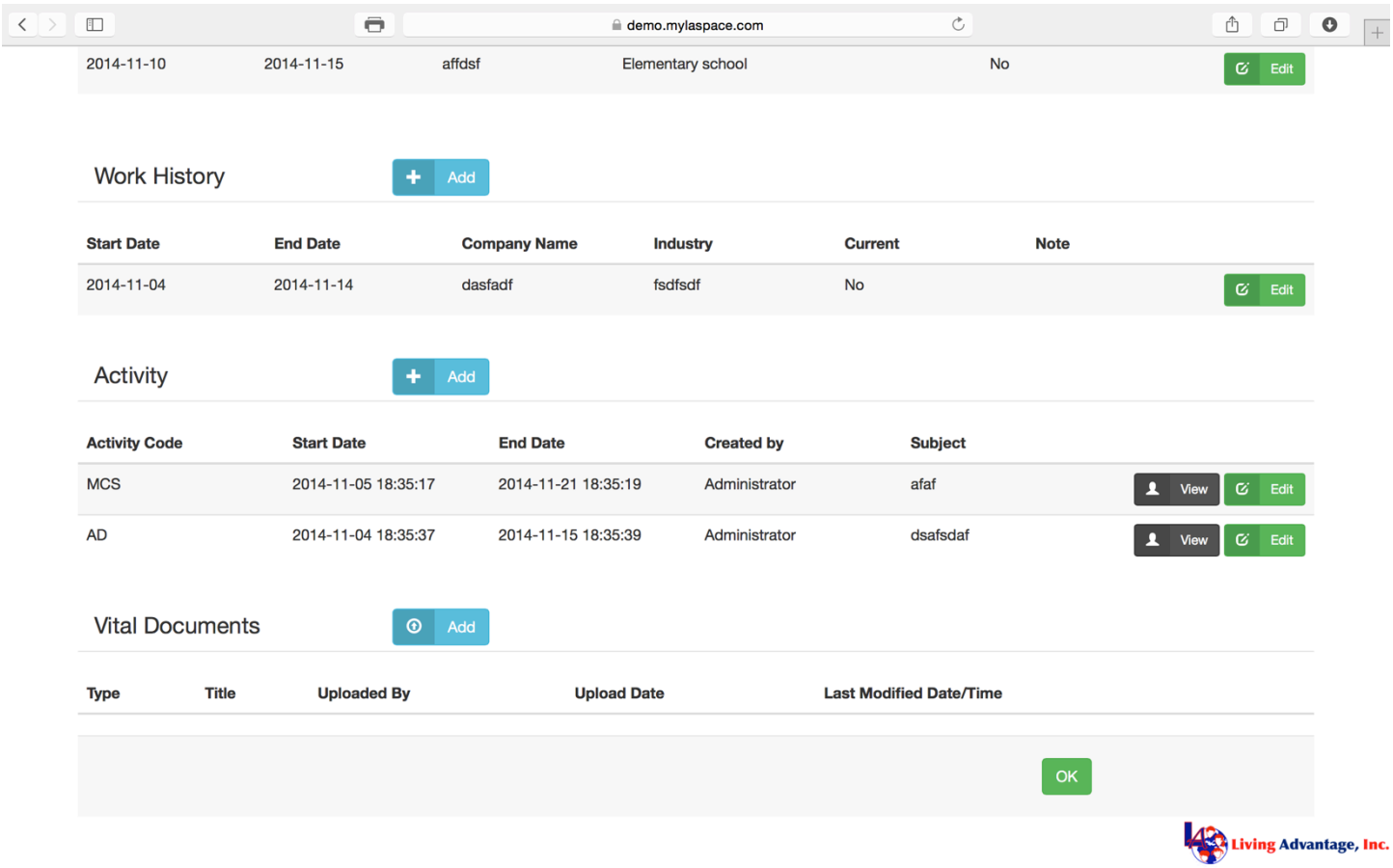
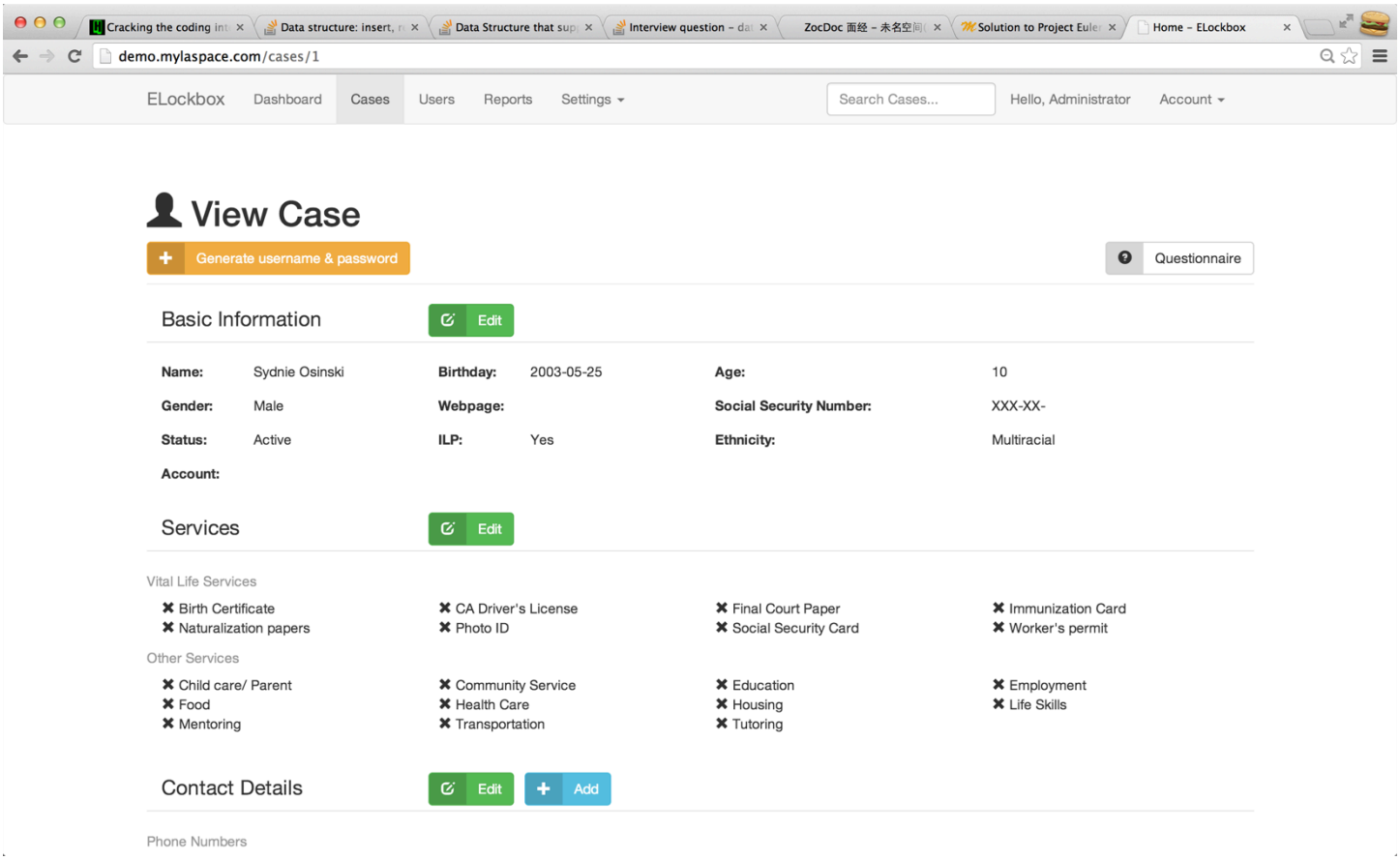
Contact Details
Edit
Add
Phone Numbers
Emails
No.1 : qer@153.com
Address Information
Edit
Add
New: ffsdf gdsfgdfg LA CA 90007
Additional Contacts
Edit
Add
Name: ggda fsdfs
Relationship: Mother
Phone: 123-456-7899
Email:
Emergency Contacts
Edit
Add
Name: asdaf fdsfs
Relationship: Father
Phone: 123-456-7890
Email: ewe@163.com
Education History
Add
Start Date
End Date
School Name
Level
Address
Current
Note
2014-11-10
2014-11-15
affdsf
Elementary school
No
Edit



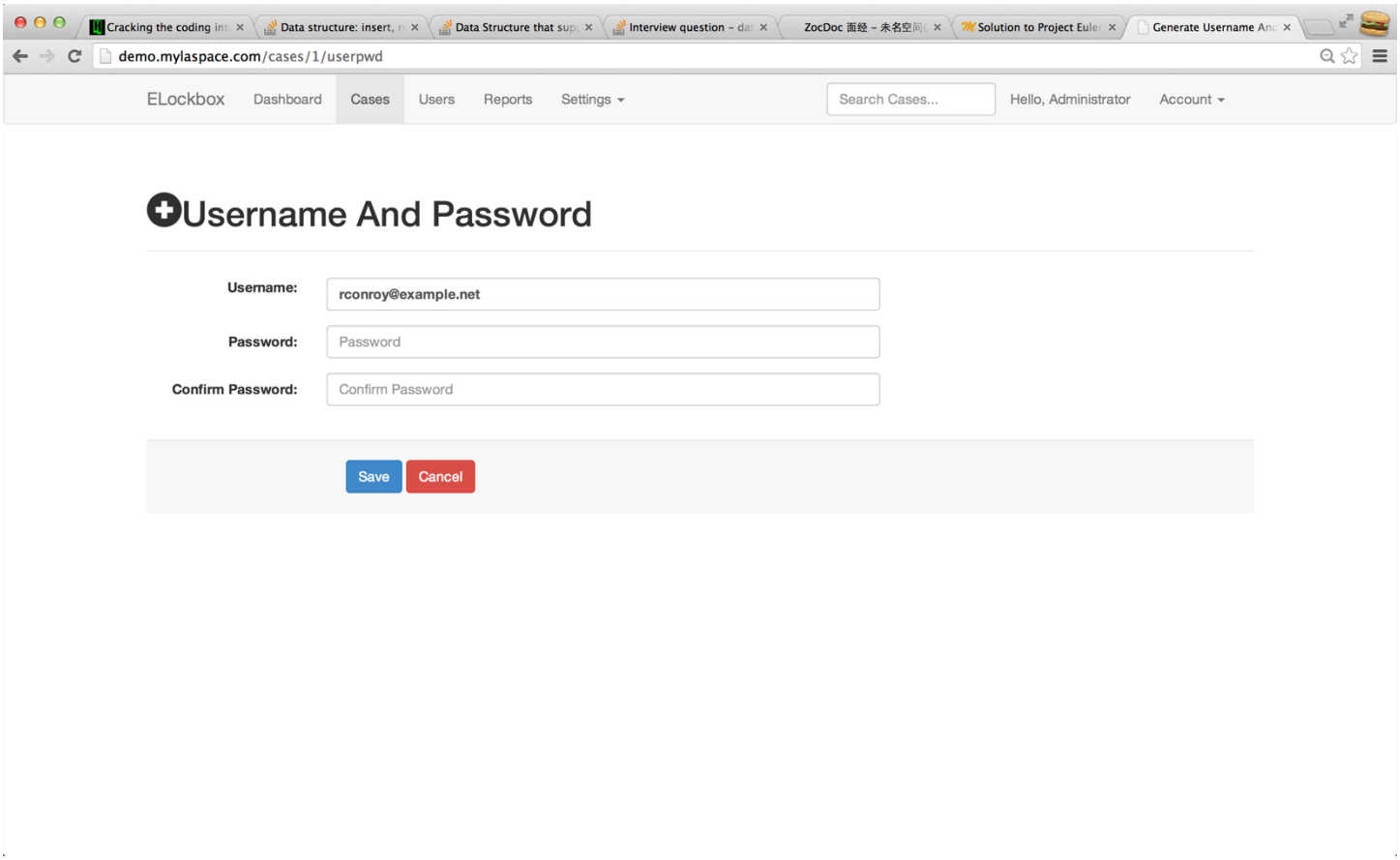
Living Advantage, Inc.

In the View Case Page, Edit button is for editing related fields information, Add button is for adding related fields information.

3.3.7 Generate Username and Password

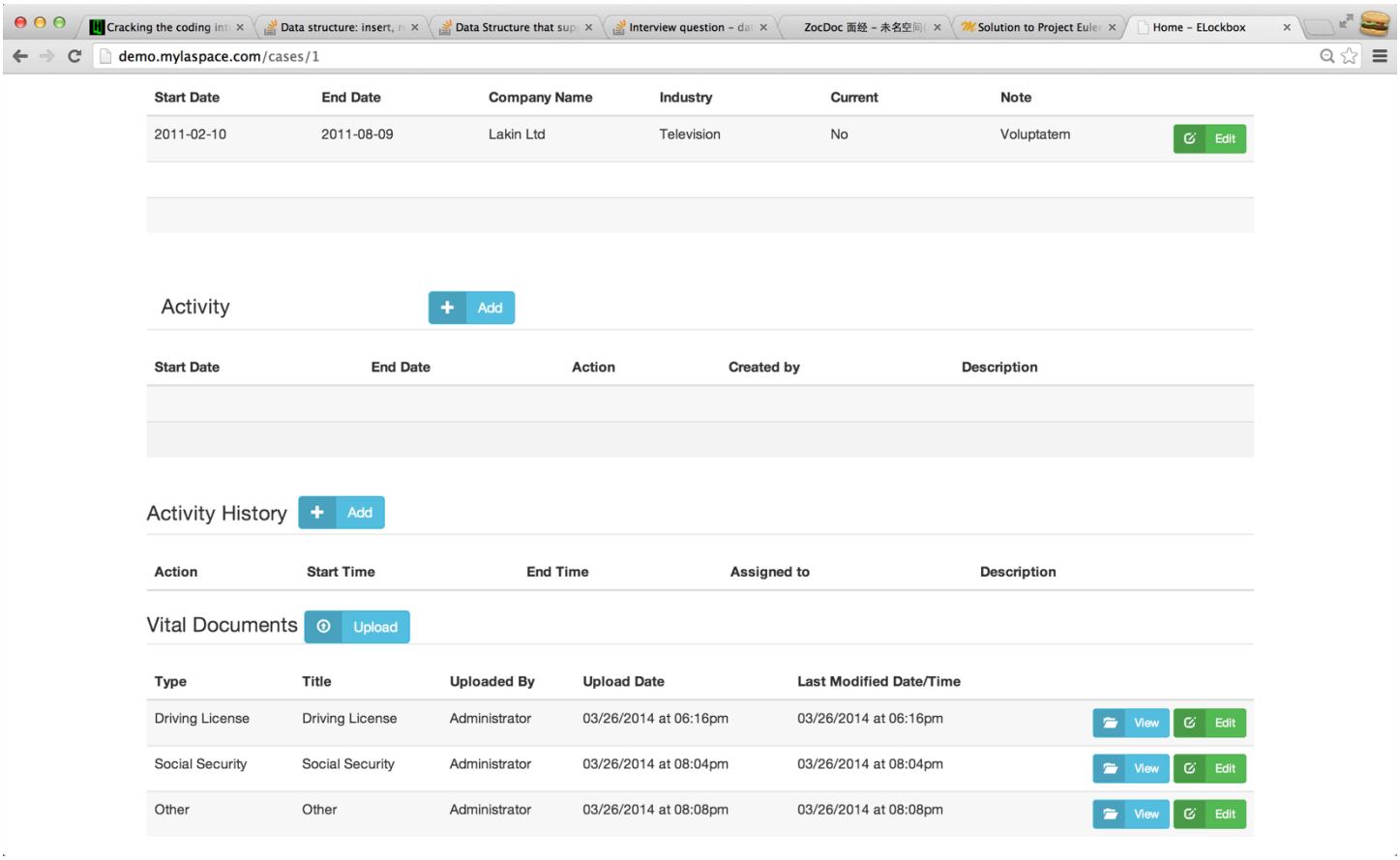


In the View Case Page, admistrator can click Generate username & password button to generate Username and Password for the target person of this specific Case.

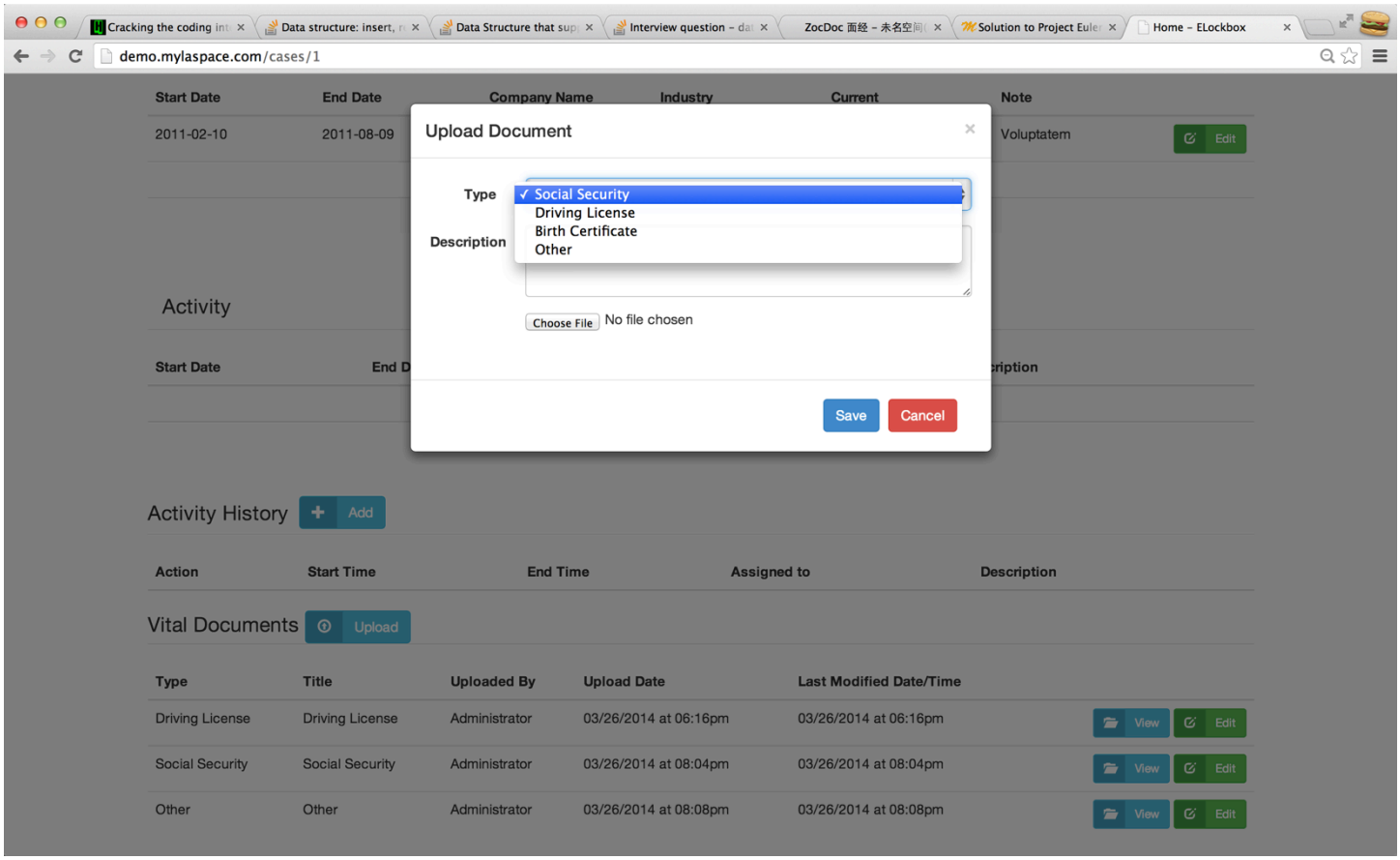


After clicking the Generate username & password button, admistrator can enter Username and Password to generate Username and Password for the target person of this specific Case.

3.3.8 Upload Vital Documents



At the bottom of View Case Page, admistrator can Upload Vital Documents and View Vital Documents throught clicking the Upload button and View button.

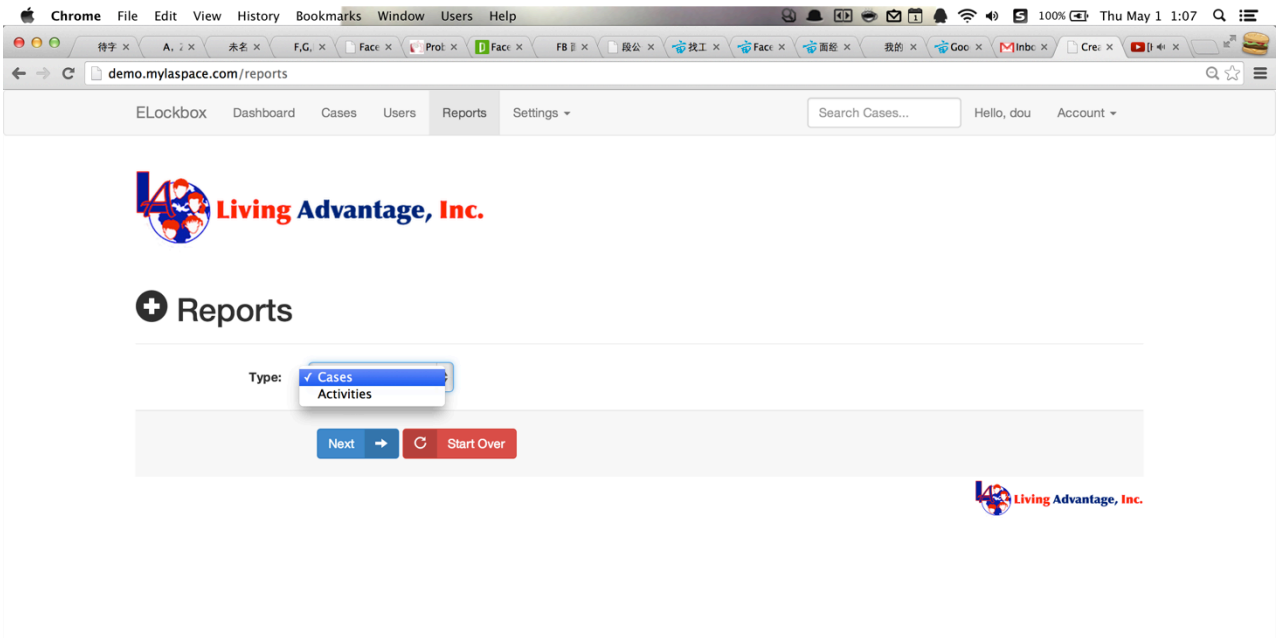


After clicking the Upload button, admistrator can select a document Type, enter a Description and choose a file from his/her disk to be uploaded.

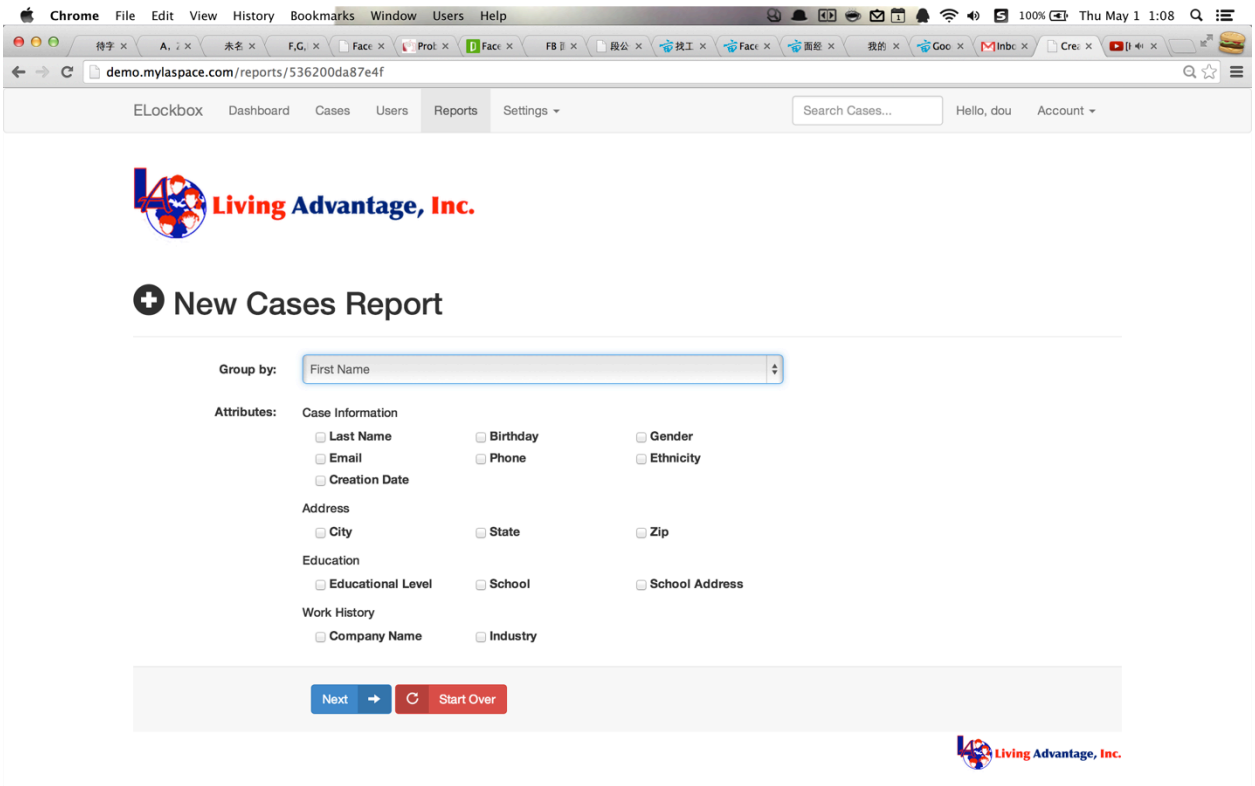
3.4 Report

3.4.1 Case Report

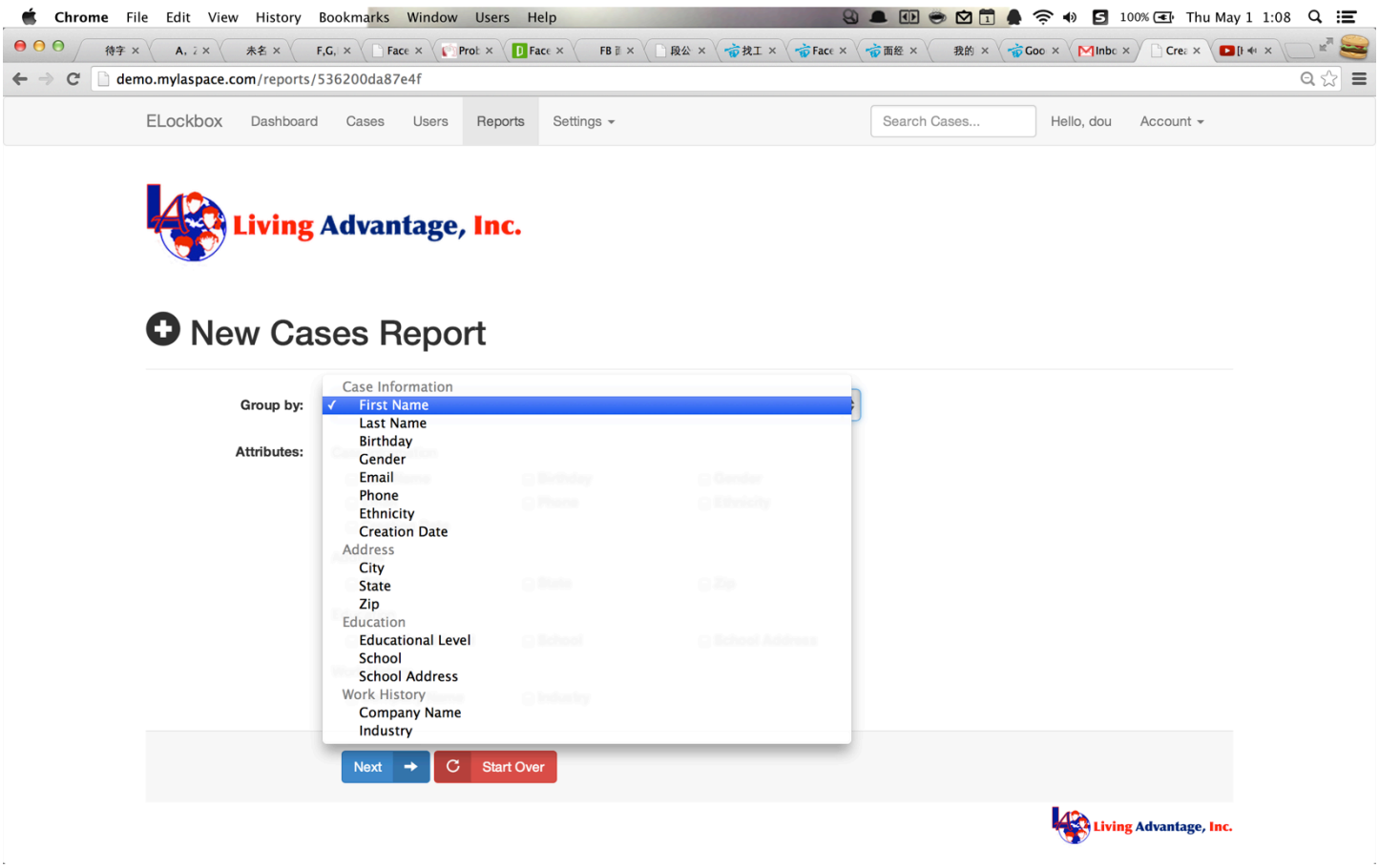
From the menu bar the user can choose the Reports tap to add new report as you see in the following.



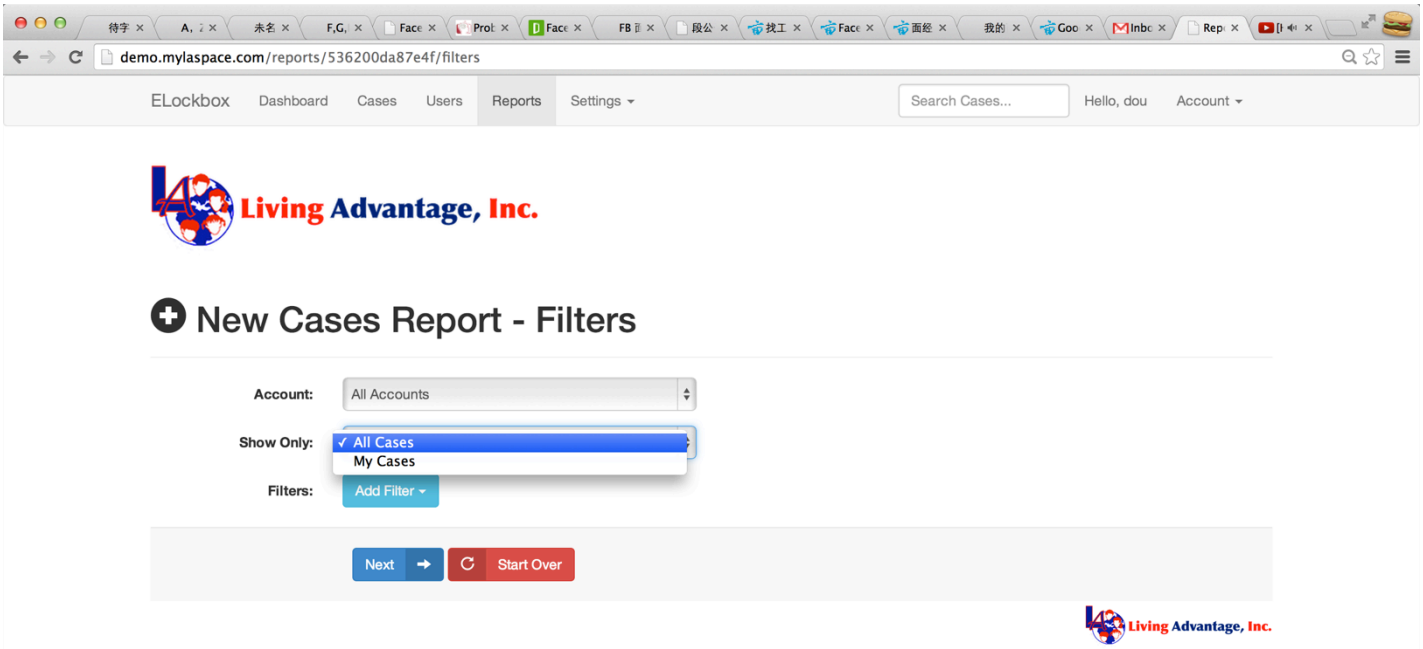
Select Type of report to be generated.



Case Report generation path, user can select which attributes to be displayed.



After select Cases in the previous step, Case Report generation path will be displayed, user can select by which attribute the Report results will be grouped.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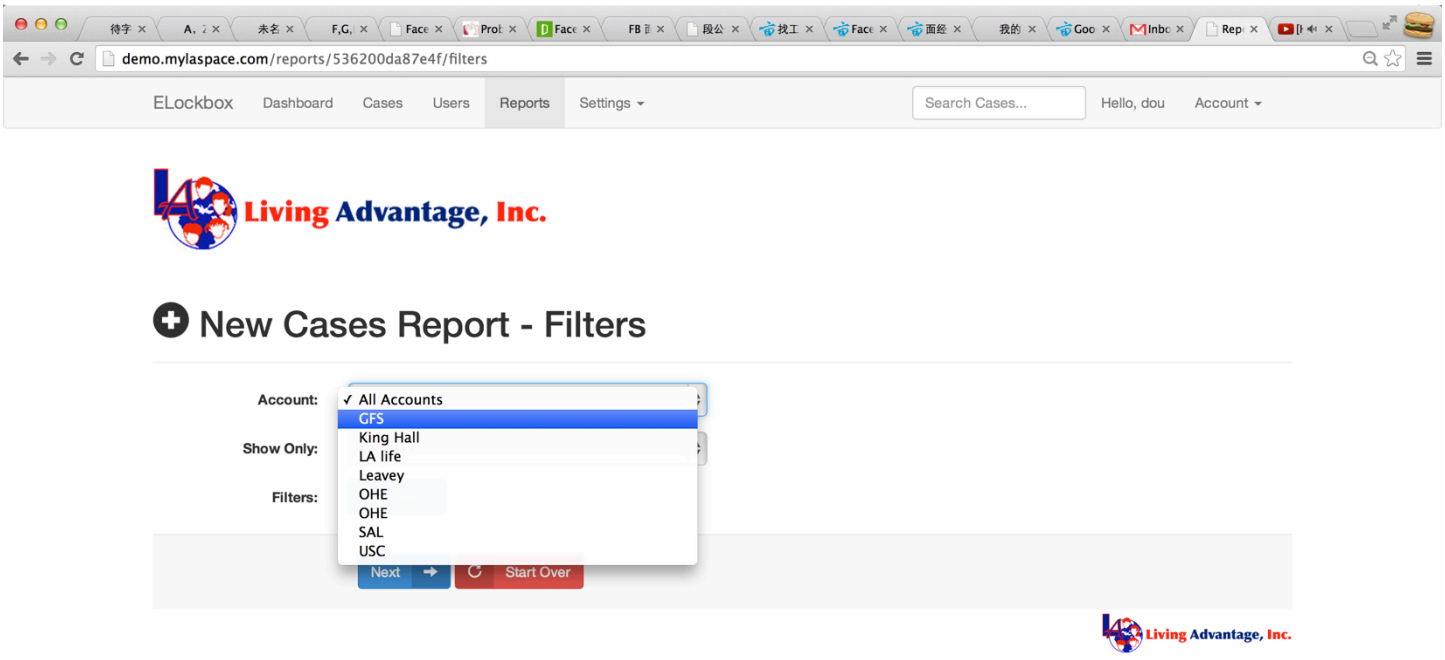
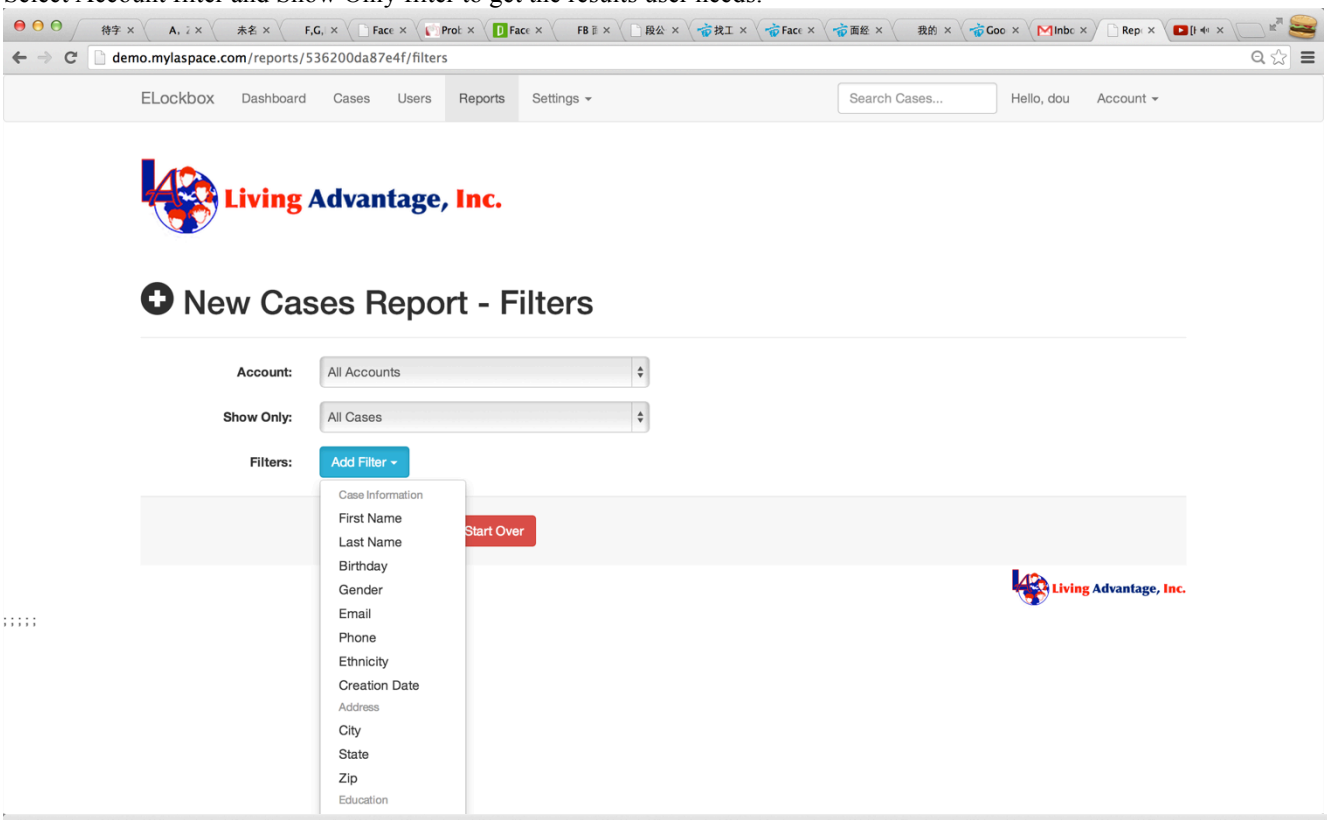
ELockbox
Dashboard
Cases
Users
Reports
Settings
Search Cases...
Hello, dou
Account
Living Advantage, Inc.
New Cases Report - Filters
Account:
All Accounts
Show Only:
All Cases
My Cases
Filters:
Add Filter
Next
Start Over
Living Advantage, Inc.

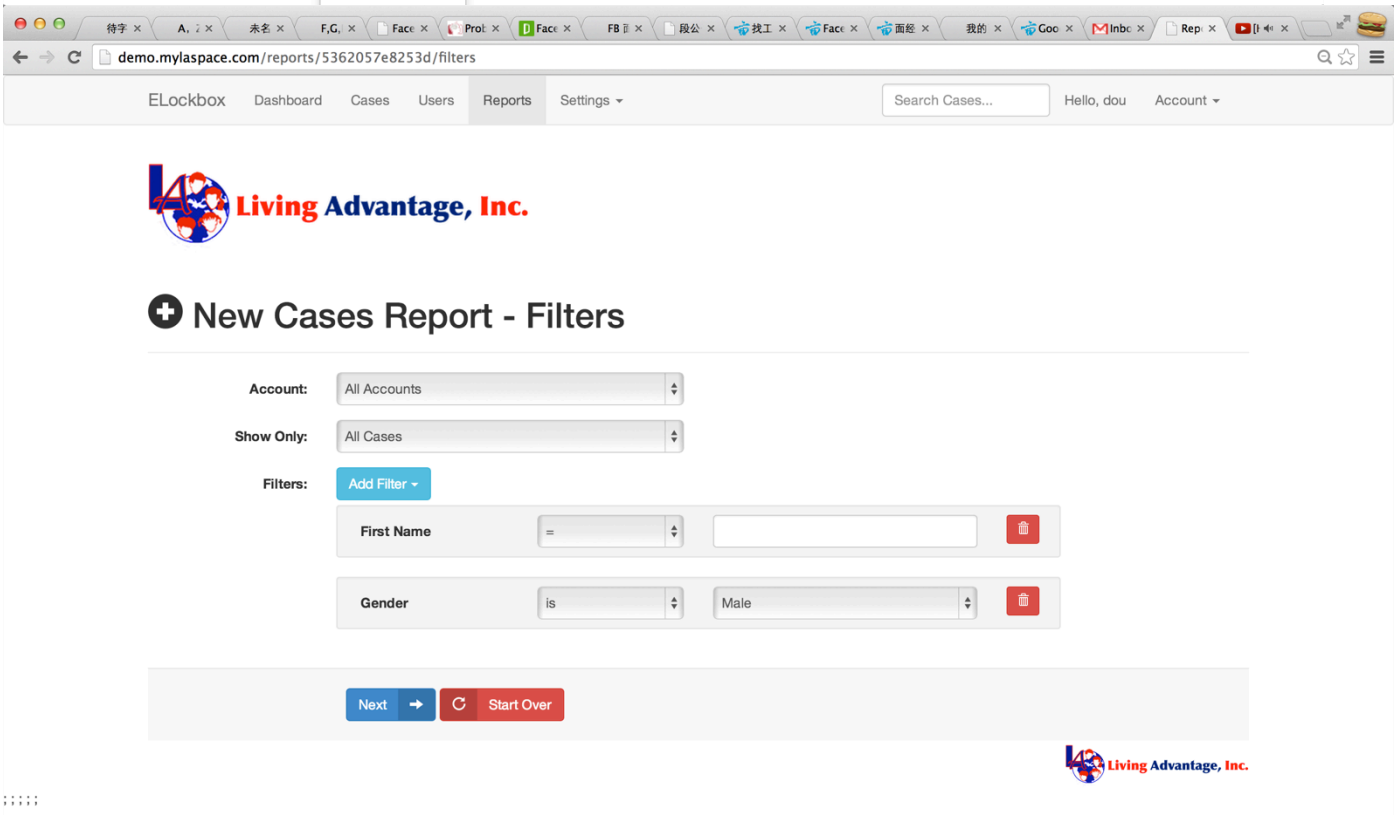
;;;;;


demo.mylaspace.com/reports/536200da87e4f/filters
ELockbox
Dashboard
Cases
Users
Reports
Settings
Search Cases...
Hello, dou
Account
Living Advantage, Inc.
New Cases Report - Filters
Account:
All Accounts
GFS
King Hall
LA life
Leavey
OHE
OHE
SAL
USC
Show Only:
Filters:
Next
Start Over
Living Advantage, Inc.

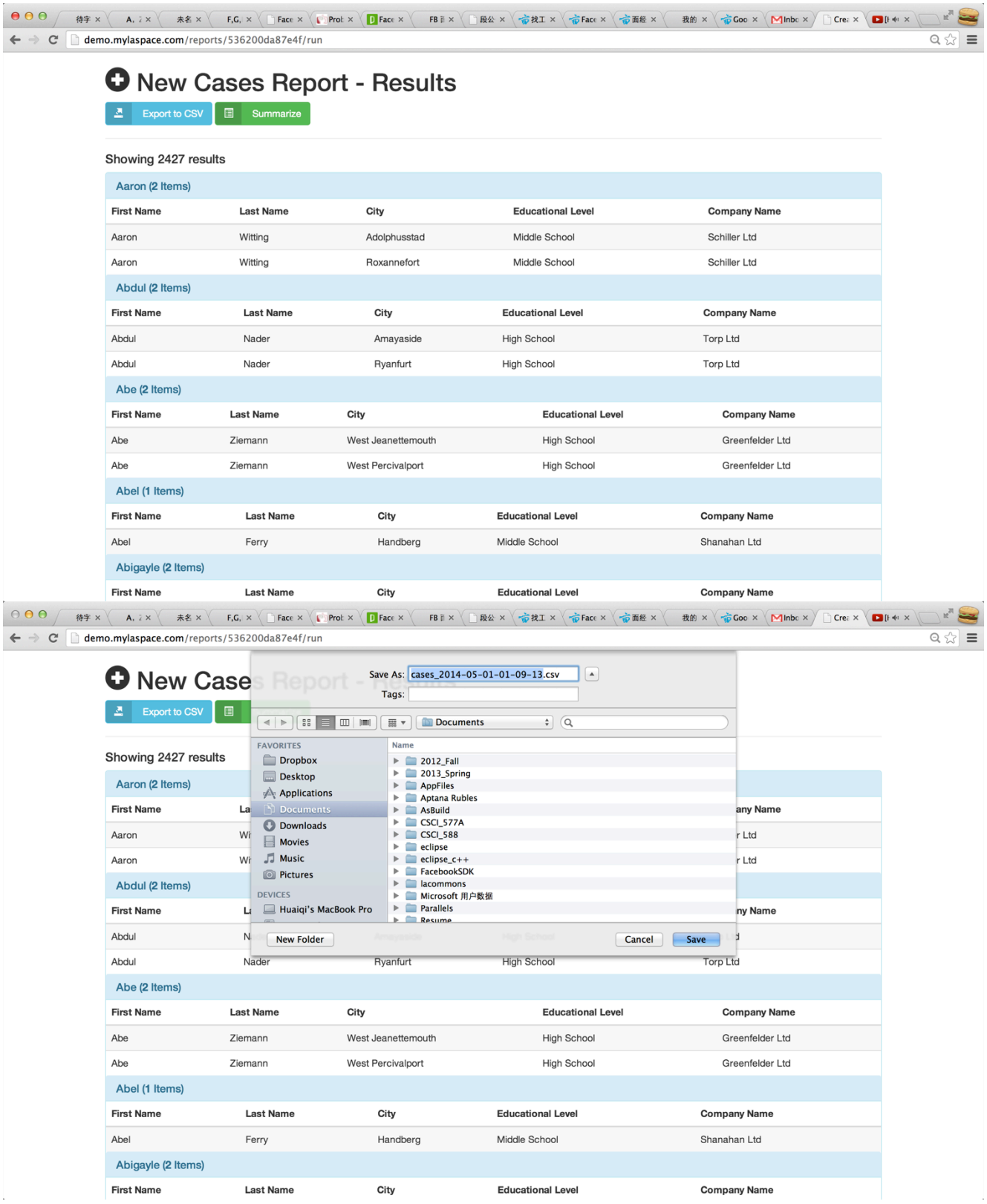
;;;;;

Select Account filter and Show Only filter to get the results user needs.

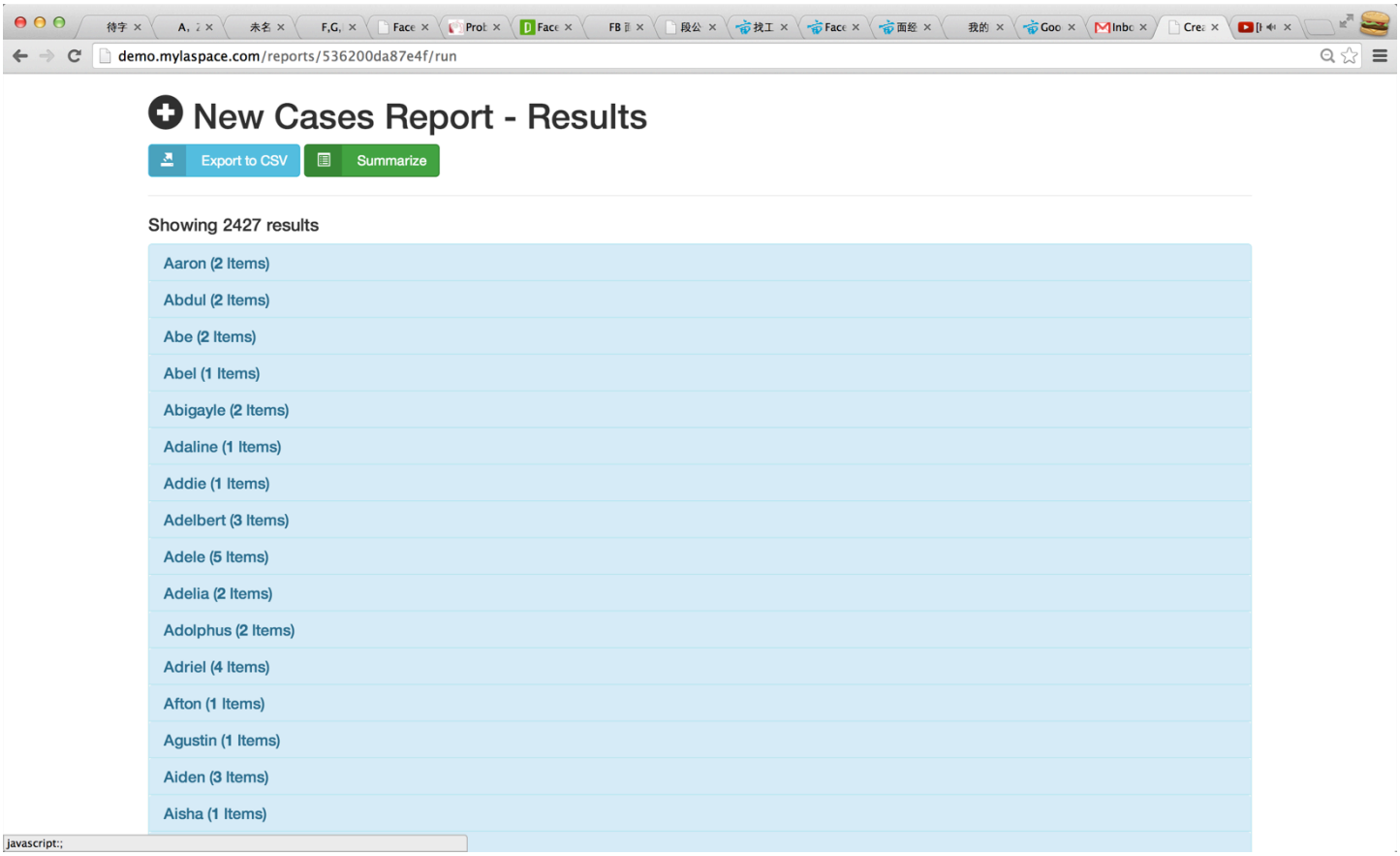




User can also add other filters if he/she needs. All filters can be gotten by clicking the Add Filter button.

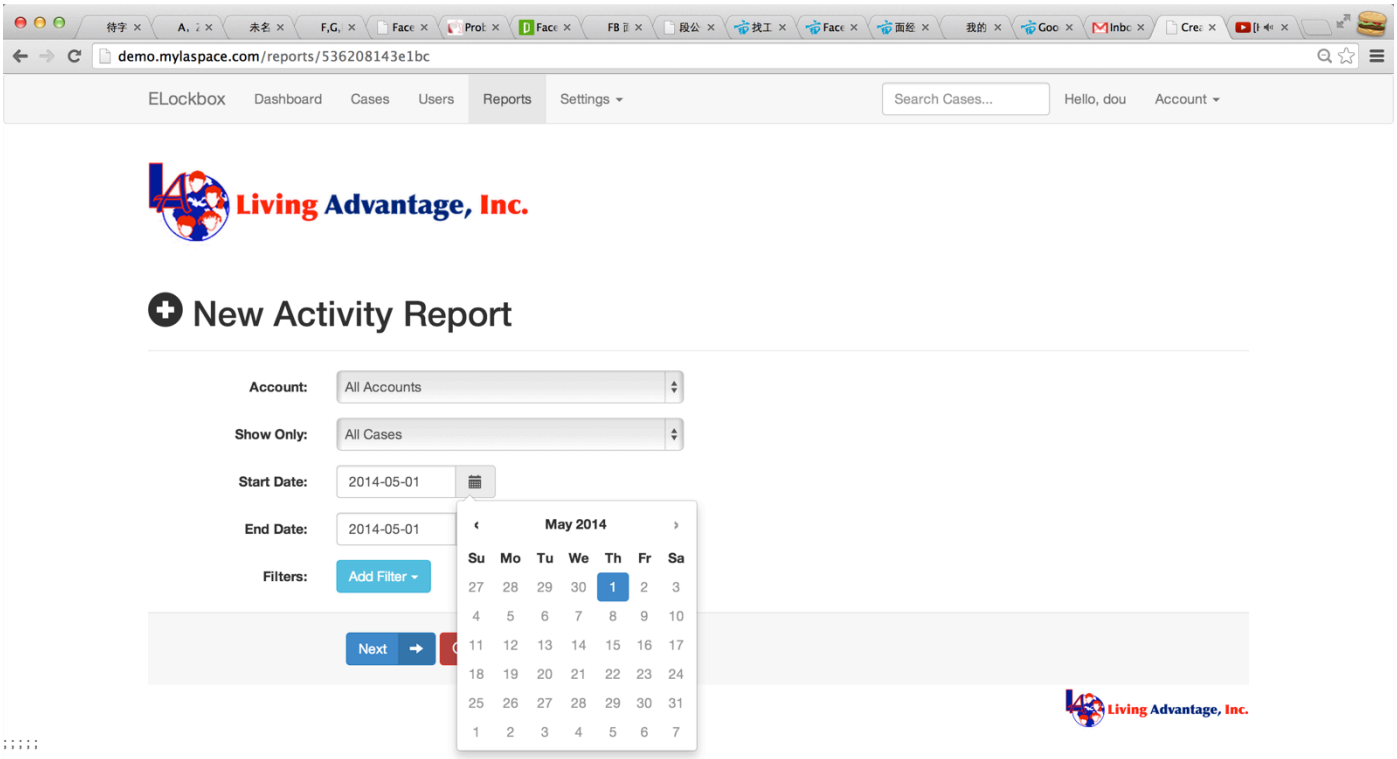


After clicking Next button in above step, report results user needs is displayed. After clicking the Export to CSV button, user can save the report results as .csv extension file to his/her computer.

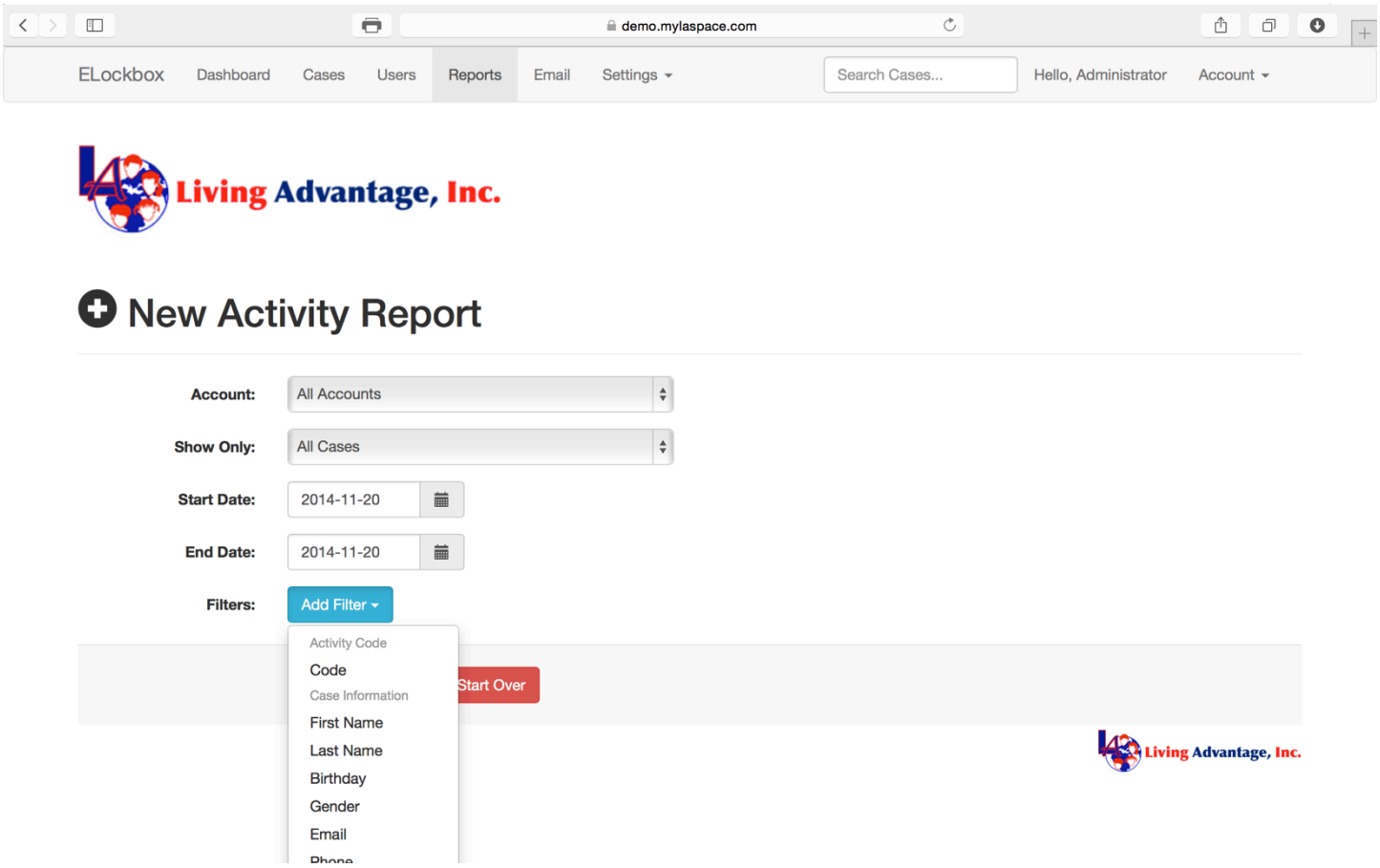


The Summarize button is for expanding or collapsing all the report results.

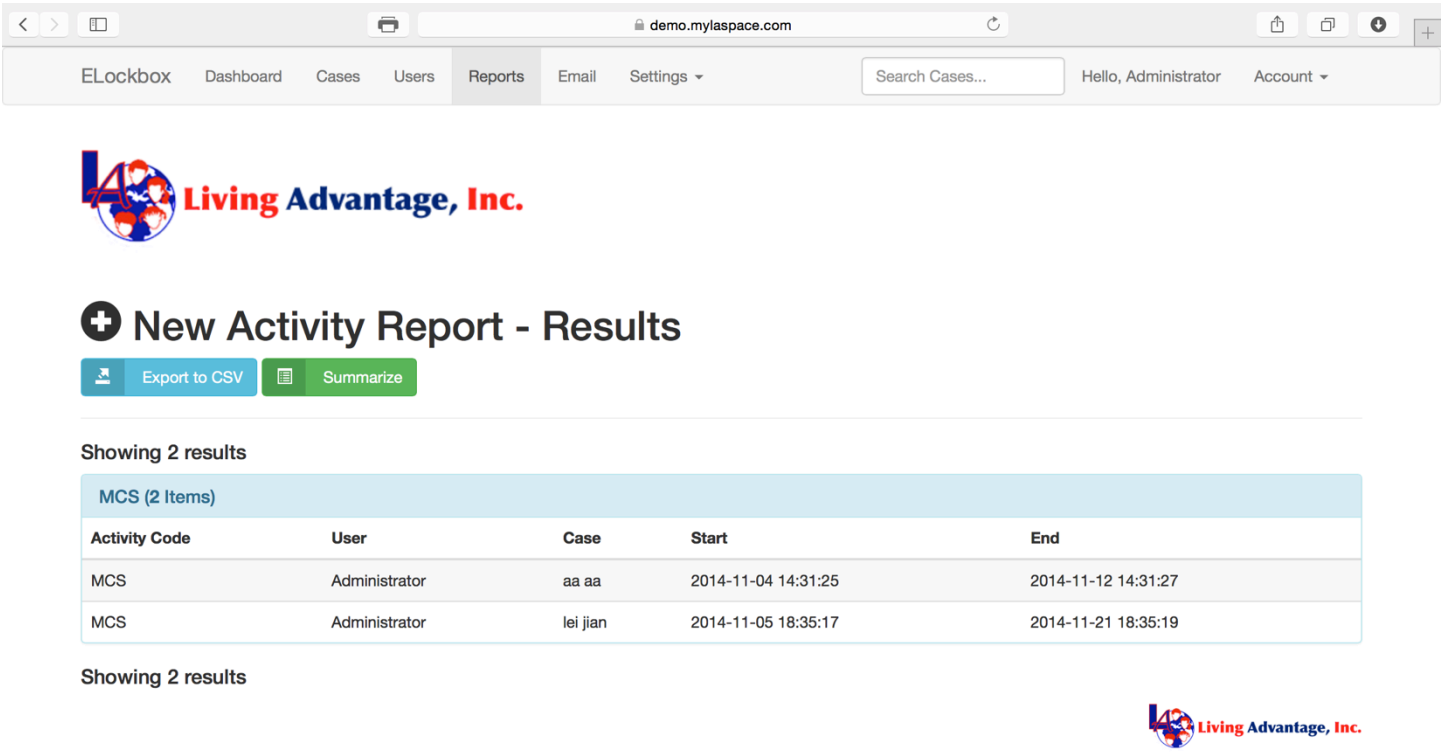
3.4.2 Activity Report


demo.mylaspace.com/reports/536208143e1bc
ELockbox
Dashboard
Cases
Users
Reports
Settings
Search Cases...
Hello, dou
Account
Living Advantage, Inc.
New Activity Report
Account:
All Accounts
Show Only:
All Cases
Start Date:
2014-05-01
End Date:
2014-05-01
Filters:
Add Filter
May 2014
Su Mo Tu We Th Fr Sa
Next
Living Advantage, Inc.

;;;;;


demo.mylaspace.com
ELockbox
Dashboard
Cases
Users
Reports
Email
Settings
Search Cases...
Hello, Administrator
Account
Living Advantage, Inc.
New Activity Report
Account:
All Accounts
Show Only:
All Cases
Start Date:
2014-11-20
End Date:
2014-11-20
Filters:
Add Filter
Activity Code
Code
Case Information
First Name
Last Name
Birthday
Gender
Email
Start Over
Living Advantage, Inc.

After selecting Activities in Reports type selection step, Activity Report path will be displayed, it is similar to Case Report part except that user can select Start Date and End Date filter.

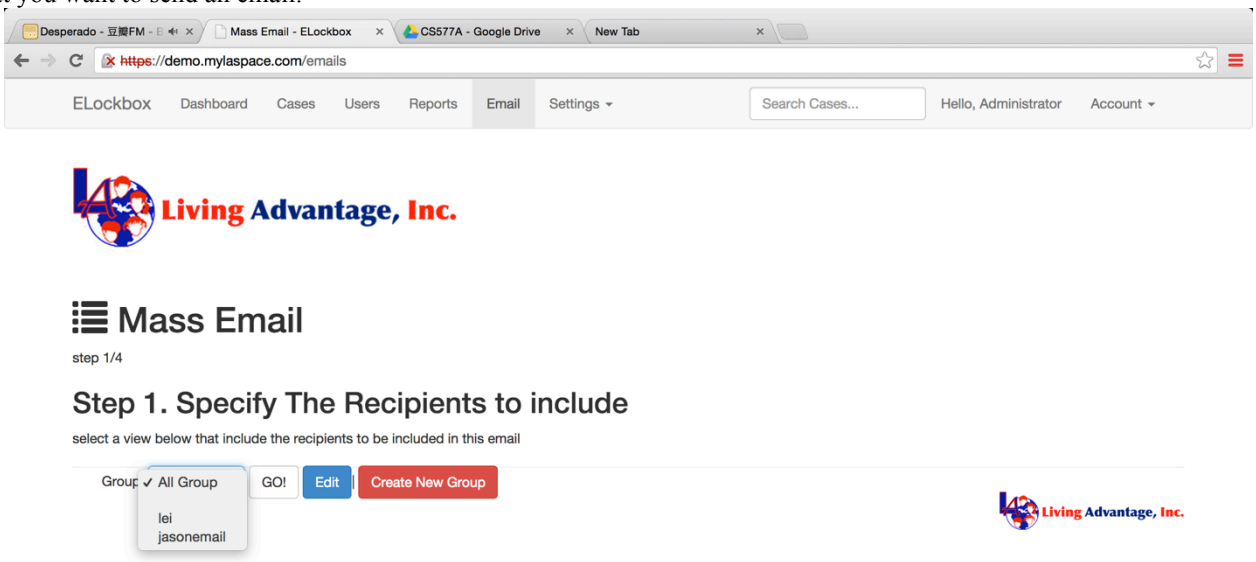


The Activity Report results is displayed after clicking Next button in previous step. Export to CSV and Summarize button do the same thing as Case Report results part.

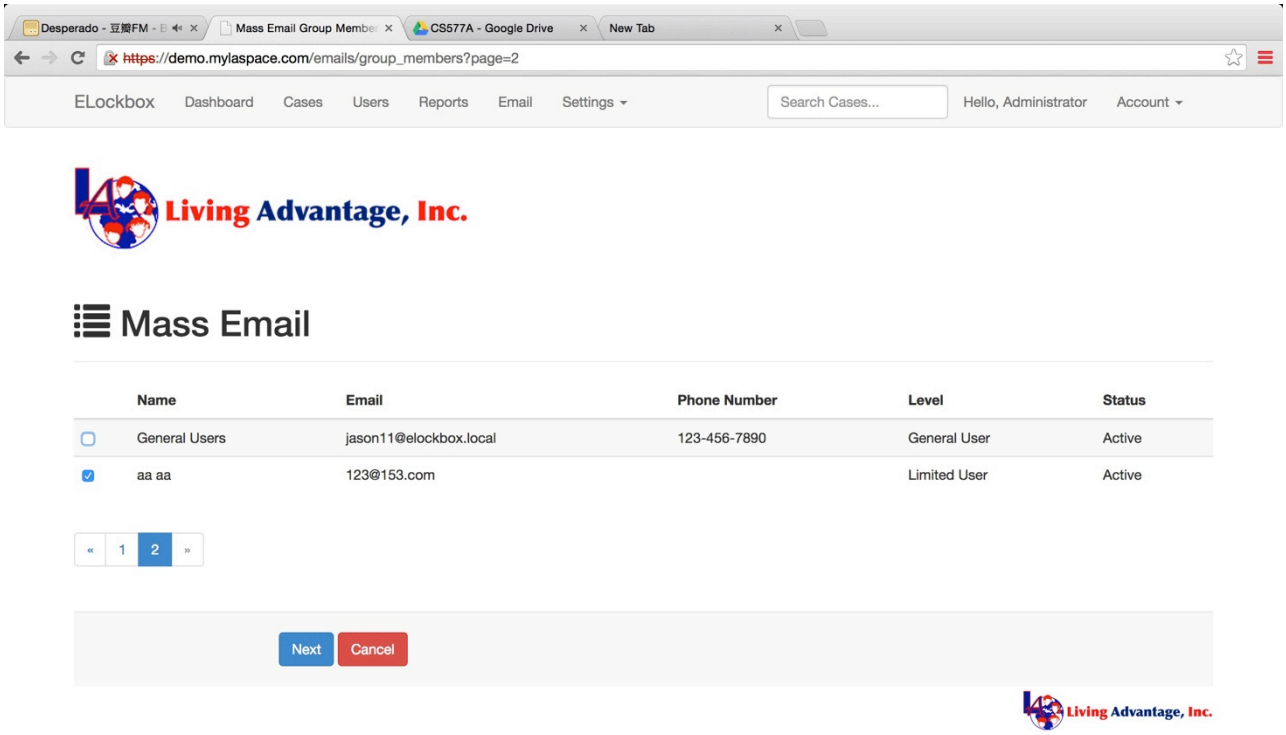
3.5 Frequently Asked questions

3.5.1 Specific Recipients

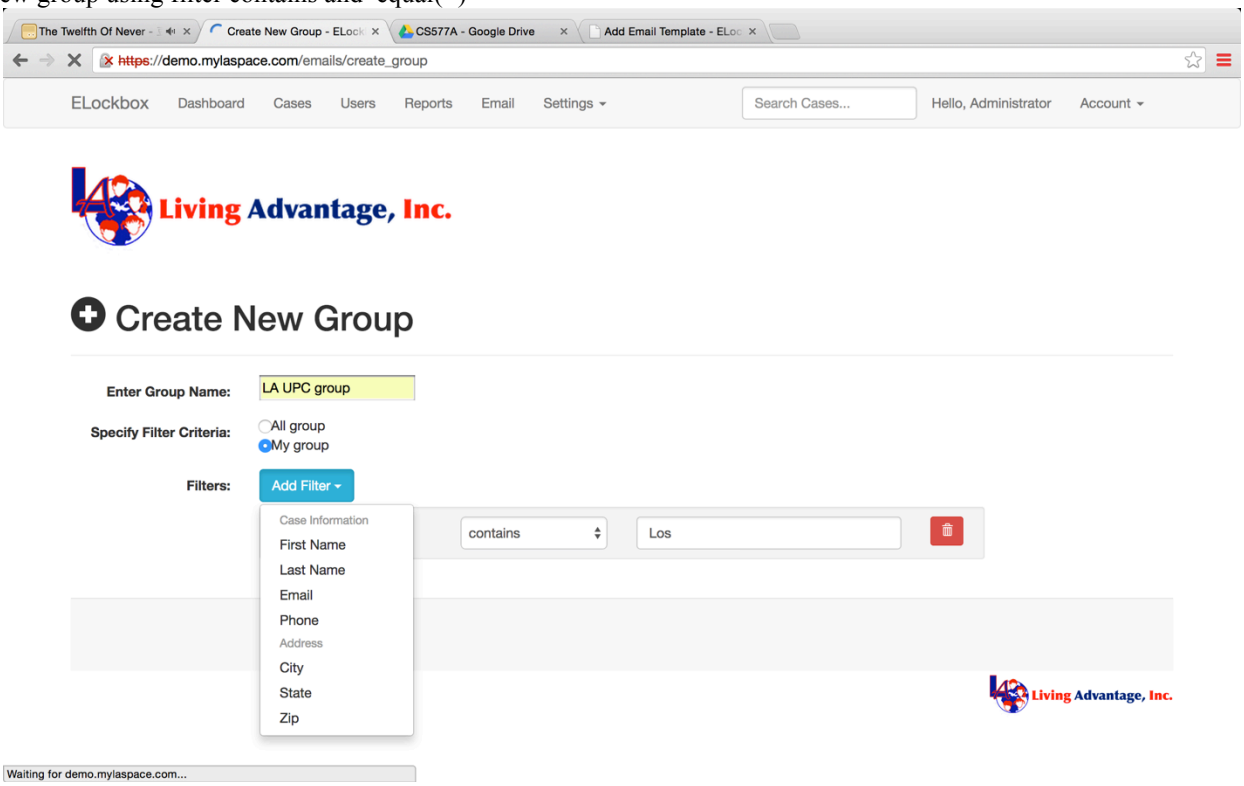
This is Step 1 of send mass email; you can choose one group that you want to send email. Click button click to select specific youth users that you want to send an email.



Click or unclick the checkbox before the uses info to include or exclude specific user in the group email receivers

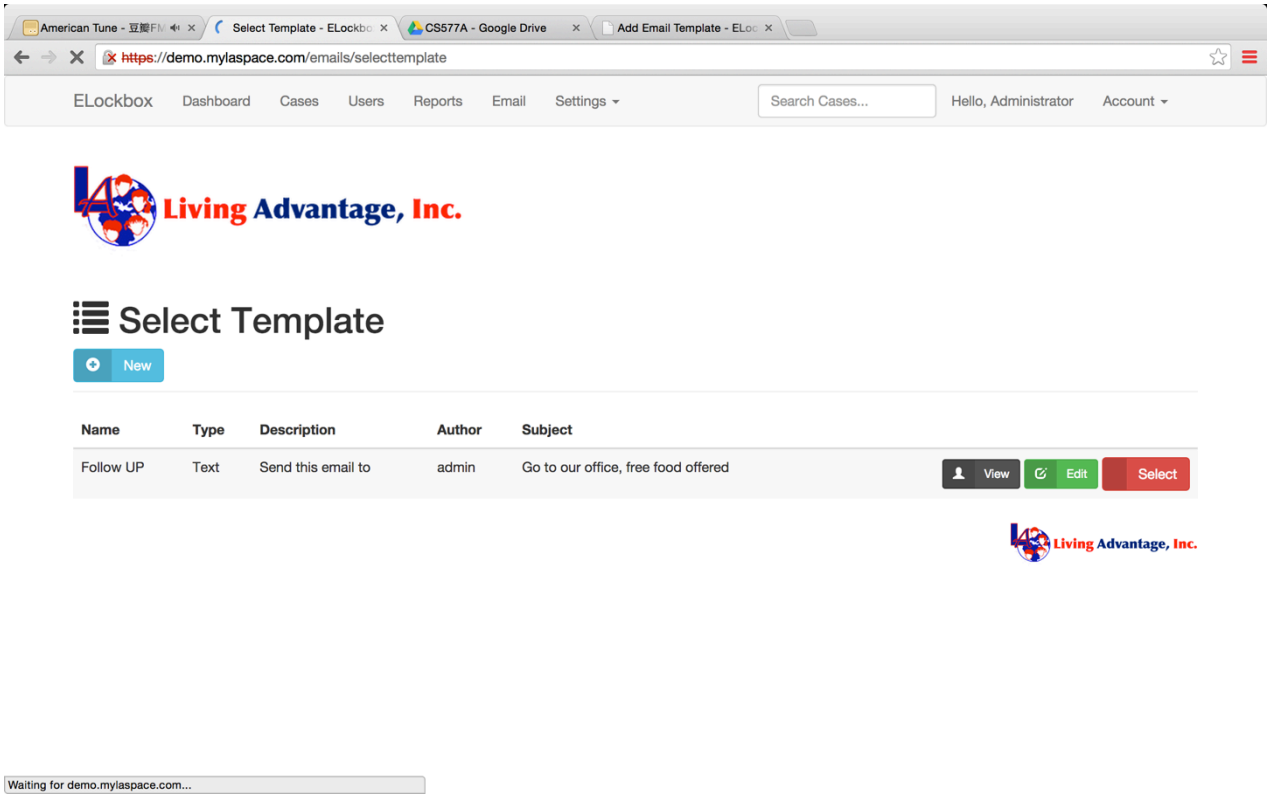


Add an new group using filter contains and equal(=)

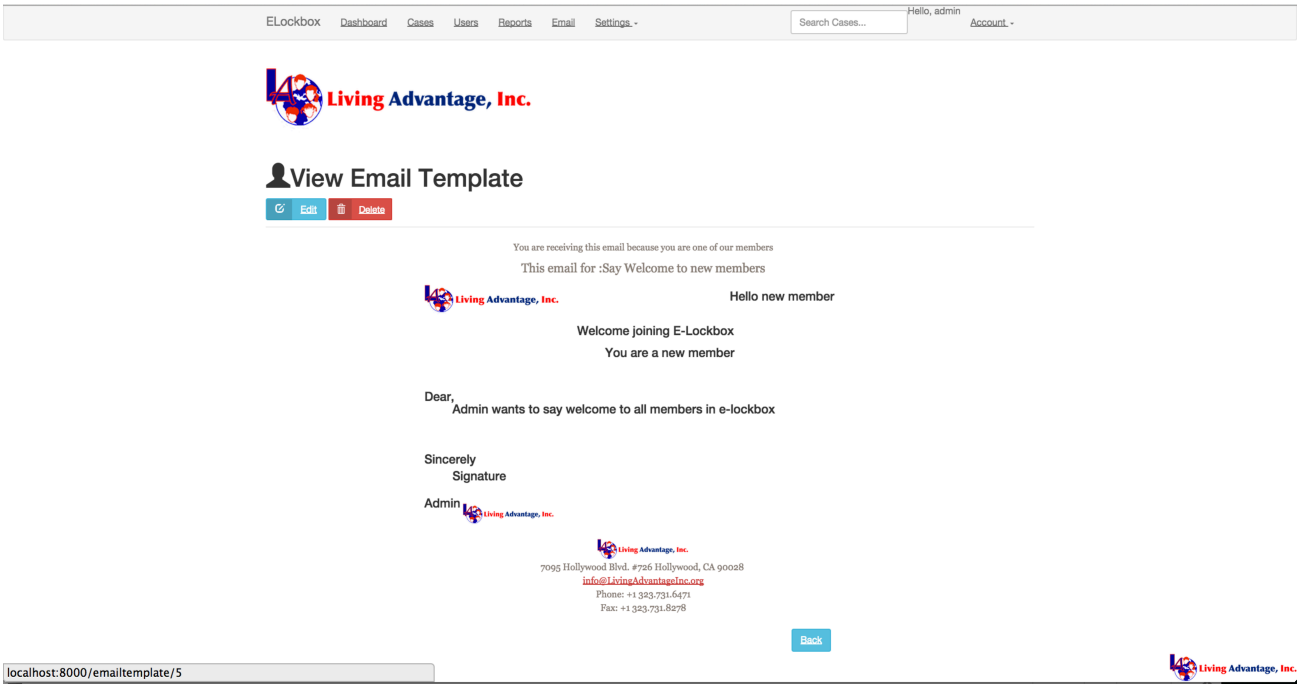


3.5.2 Select Email Template

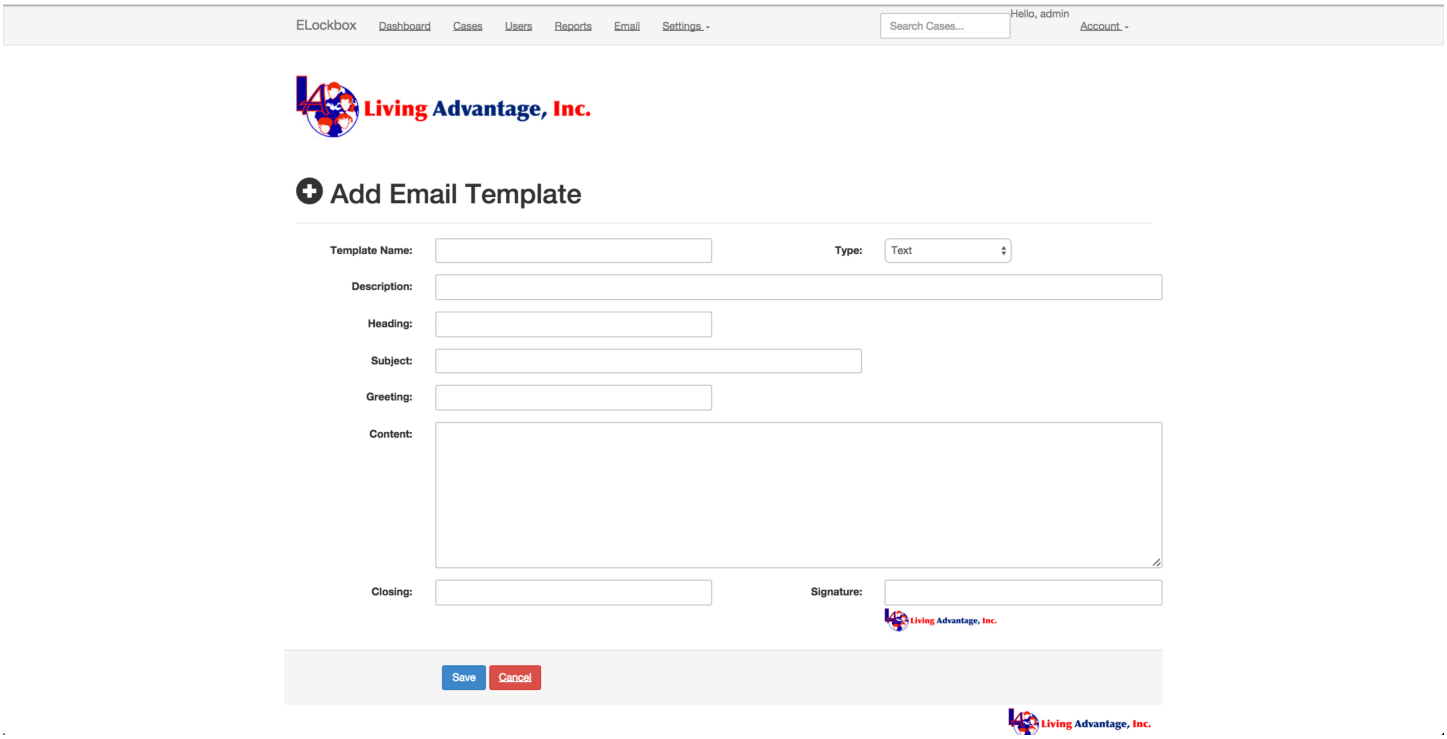
From menu click on Setting tap then click on ‘select’ to add an email template



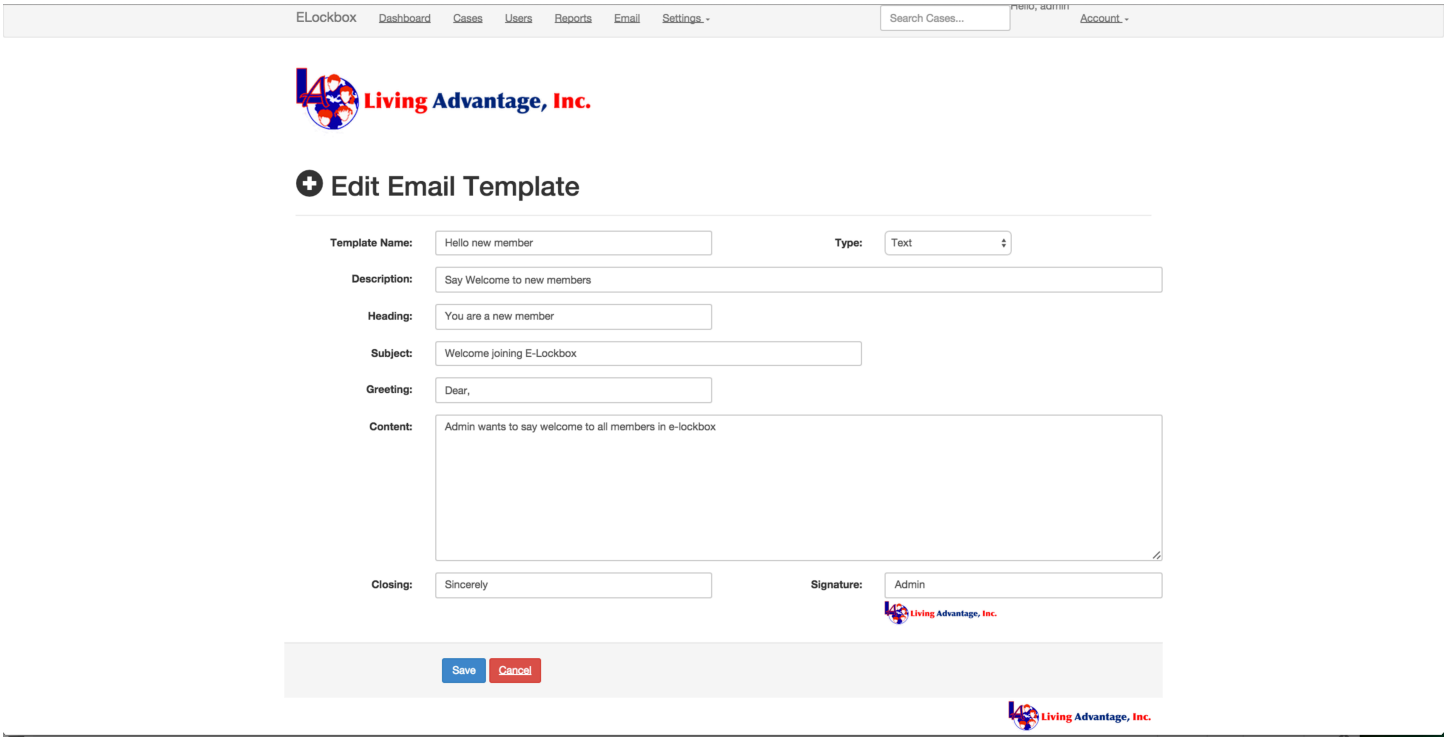
View the template



Add an new Email Template



Edit an existing email template



4. Troubleshooting

4.1 Frequently Asked questions

<< List Frequently Asked Questions by operators, and answers to those questions.>>

4.2 Error Codes and Messages

Error/ Message	Meaning of the message	Action to be taken
User creation fields uncompleted	One or more fields of the user creation fields cannot be empty or incorrect	Complete or modify the information in the pointed field
Case creation fields uncompleted	One or more fields of the case creation fields cannot be empty or incorrect	Complete or modify the information in the pointed field
Report generation attributes not selected	At least one attribute should be selected	Select at least one attribute

4.3 Note

Term	*Meaning*
Accounts	Accounts used to show the types of cases.
Summarize	Expand or Collapse All Fields of a block in Report Results